

IEEE INTERNATIONAL INSTRUMENTATION AND MEASUREMENT TECHNOLOGY CONFERENCE

I²MTC



Handbook

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IEEE INTERNATIONAL INSTRUMENTATION AND MEASUREMENT TECHNOLOGY CONFERENCE

WELCOME

This manual is designed to assist committee chairs in planning and carrying out their responsibilities to make the International Instrumentation and Measurement Technology Conference (I²MTC) a success. Included are general guidelines, answers to some operational questions and suggested deadline dates for various stages of progress.

I²MTC is an international technical forum for disseminating and exchanging information concerning the science and application of instrumentation and measurement – accomplished through technical conference sessions, exhibits and publication of conference papers. I²MTC – a focused technical conference – is a meeting place where engineers, teachers, scientists, students and others discuss information relative to specific disciplines and areas of interest. The permanent sponsor of the Conference is the IEEE Instrumentation and Measurement Society. A Charter sets the policy of the Conference and a Board of Directors is the governing agent, providing primary direction, advice and counsel to the Conference Committee. The Society Administrative Committee appoints four members to the Conference Board of Directors. Co-sponsors may be the IEEE section in which the Conference is held in a given year. There may also be technical sponsors which publicize the Conference and allow the use of their names by the conference but do not participate financially.

Continuity is necessary and there are important rules to observe. However, there is plenty of latitude for change, for updating and for new ideas and techniques. The Conference Committee is a working body and it is important that each member devotes sufficient time to carry out specific assignments. Committee chairs constitute the Conference Committee which plans, schedules, arranges and implements the conference. All chairs must be available during the hours of the Conference. Chairmen must be reachable to answer questions, handle emergencies and generally insure the smooth operation of the conference. Because the conference committee is a team, chairs must be available to fill in for other committees in emergencies and when requested to solve problems and/or relieve a work jam.

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

The Conference has a permanent web site: <http://imtc.ieee-ims.org> which provides full details on the Conference. Conferences may establish their own web sites but they must be linked to the permanent site to provide continuity and ease of access.

For purposes of clarity, the personal pronouns “he,” “his” and “him” are used throughout the manual and carry no gender implications.

1.0 INTRODUCTION

1.1 History

A predecessor conference to the IEEE International Instrumentation and Measurement Technology Conference was held annually for 16 years in Ottawa, Ontario, Canada, and was called the "Electrical and Electronic Measurement and Test Instrument Conference." The first EEMTIC, as it was known, took place in 1966 and was dedicated solely to test instruments and measurement. Its purpose was broadened in later years to cover the science and application of instrumentation and measurement. The conference was not held in 1982 and 1983 and the Instrumentation and Measurement Society voted to revive the event and to select new conference sites for each year. The name, Instrumentation and Measurement Technology Conference (I²MTC) appeared for the first time in 1984 in Long Beach, California. Due to its recognized international relevance, the conference changed the name to International Instrumentation and Measurement Technology Conference (I²MTC) in 2008.

1.2 Conference Planning

Conference planning should begin three years prior to the date of the Conference — actually, the Conference begins its official existence when the I²MTC Board of Directors approves a conference proposal. The Board of Directors generally meets twice a year, at I²MTC in the spring and in connection with the Society Administrative Committee meeting in the fall. Proposals for hosting I²MTC are considered by the Board at these meetings.

IEEE members seeking to host an I²MTC initiate an invitation proposal (see sample proposal) and submit it to the I²MTC Board chair or the Conference Coordinator between October 1st and March 1st...

Finalists will be notified when the proposal is scheduled for Board consideration. Only the conference 3 years in the future will be awarded. (for example, the 2017 conference will be awarded at the Spring 2014 Board Meeting. It is recommended that a representative attend the Board meeting to make a presentation in person and answer questions. As a minimum, the proposal should include the Conference theme and the following three elements.

- a. Conference Arrangements — The time and place for the conference must be proposed and shall not conflict with any other conference sponsored by I&M or with any secular or religious holiday. To avoid conflicts with academic institutions, the conference date should be between April 15th and May 5th. The Conference Coordinator participates in arranging dates and site selection. The sample calendar includes I&M Adcom meetings that must be coordinated with the conference:

APRIL 2017						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1 April Fools' Day
2	3	4	5	6	7	8
9	10 Passover begins at sunset	11	12	13	14	15
16 Easter	17	18	19	20	21	22 Earth Day
23	24 Tutorials	25 ←	26 I2MTC2017	27 →	28 Arbor Day	29
30				← AdCom Meetings →		

- b. Organization — Key members of the conference organization should be identified, along with their commitments to support the conference and resumes of their experience with previous conferences. Important members of the committee, identified as a minimum, are the Conference Chairman, Technical Program Chairman, Finance Chairman and Arrangements Chairman. If the conference committee plans exhibits, it should outline a strategy and identify potential exhibitors.
- c. Financial Budget — The financial budget should be prepared using the Financial Report and Working Sheet Forms cited in the IEEE Conference Planning Guide. Important aspects of the financial budget are the fee schedule (set by the I²MTC Board of Directors), the expected number of registrations and anticipated income from other sources (e.g., tutorials, exhibits). A budget of expenses must be provided. The budget should plan for a fixed financial surplus of 20 to 25 percent of total expenses.

The I&M Society and a local Section co-sponsor enter into a Memorandum of Agreement that spells out specific responsibilities of and benefits to both parties. The letter is the cornerstone of the Society-Section partnership in the specific I²MTC conference.

1.3 Planning Schedule

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

2 Yrs before	18 Mo. before	1 yr before	9 Mo. before	6 Mo. before	4 Mo. before	3 Mo. before	1 Mo. before	Conf week	+1 Mo
Appoint Committees	Communication & Marketing Materials	Paper Mgmt Process	Plan Social Activities	Complete Paper Review	Assign Exhibitor Space	Review room block w/ Hotel	Early Registration Deadline	Set up registration, exhibits, etc.	Wrap up
Select Site	Exhibitors Prospectus	Technical Program	RFPs for Gnd Transport	Finalize Technical Program	Order giveaways	Assign Volunteers		Provide Signs and Volunteers for directions	
	Outreach to Corporations and Institutions	Call for Papers							
	Apply for Grants								
Program									
Exhibits									
Marketing									
Institutional Outreach									
Local Arrangements									

1.4 Conference Coordinator

The Conference Coordinator is paid a retainer fee. The Society loans funds for the Conference share of the fee with repayment after the Conference. The conference database is maintained in his office, as is the Conference bank account. He acts as liaison with IEEE Headquarters and I&M Society leadership and when appropriate with the local section co-hosting the conference. The Coordinator helps organize and produce I²MTC and answers to the I²MTC Board of Directors. His office works with all committees in helping carry out their responsibilities. Although he reports to the Conference Chair, he is available to all members of the Conference Committee as needed. He also serves as the executive agent of the Board of Directors and the representative of the I&M Society AdCom.

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

The Coordinator maintains software programs specifically developed to handle I²MTC finances, registration, mailing lists, CD proceedings production and program production. All registration, financial, technical program and mailing list data flow through the Coordinator as part of the corporate memory of I²MTC which he maintains. He is responsible for filing with IEEE the Conference Information, Conference Publications, and Insurance Application forms and budget.

Several foundations and private organizations may provide travel funds for qualified persons to attend conferences. Most candidates for these funds are from Eastern Europe or developing countries and do not have the financial resources to travel on their own. The Coordinator serves as the contact between these funding sources and the Conference.

The I²MTC Board of Directors is required under the Conference Charter to approve in advance any major commitment of funds; "major" in this case is generally considered any expense commitment exceeding \$3,000. The Board has delegated this approval process to the Conference Coordinator and he must be consulted before contracts covering all printing, hotel/facilities and exhibit decorating services are signed. He must be included in decisions relating to meal guarantees during the conference.

1.5 Coordinator Activities

The Coordinator provides the following basic support to committee chairs:

Conference Chairman - Advises on policy, organization and timing, acts as liaison with IEEE Headquarters and I&M Society, maintains corporate and historical files, coordinates travel grants and other support from foundations and organizations; prepares and submits conference information schedule, interfaces with conference facility and participates in development of conference theme ,logo and support materials.

Vice Chairman - Provides background information and logistical support for selected speakers.

Technical Program - Assists in preparation and distribution of call for papers, manages the web-based papers program, provides bi-weekly updates to the webmaster to keep authors and attendees advised of the status of the program, monitors registrations and payments by authors assists with the review process and maintains a database of reviewer scores and comments to author and technical chairs, insures requirements for IEEE-mandated Xplore compatible formats are met, prepares and posts on the web author kits and accept and reject notices, collects manuscripts submitted for Proceedings and serves as principal communication source for authors, maintains checklist of materials received and posts on the web and provides Xplore disk to IEEE..

Exhibits - When exhibits are included, he provides application forms and contracts for exhibiting companies, assists in selecting and negotiating with an exhibit contractor and establishing move-in, move-out hours and other regulations and helps in exhibit floor layout as requested.

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

Arrangements - Identifies specific needs for session and poster rooms, banquet space, plenary hall, exhibits area, signs, committee meeting rooms and sleeping accommodations and aids in selection of hotel/facility and negotiating contacts. Works with local committee to select attendees bags, if any, and features of social events, including evening reception and banquet/gala and companion tours. Submits all contracts which involve a commitment of funds exceeding \$3,000.

Registration – Develops author and attendee forms with fees set by the I²MTC Board of Directors. Collects all advance registrations and enters in database, processes funding by check, bank transfer and credit cards. Operates registration desk on site and coordinates on site registrations, badges, all tickets and receipts and certificates of participation.

Finance - Helps in developing budget files, initial and interim, manages Conference bank account, reconciles account and handles receivables and payables, providing regular reports to the Finance Chairman. Obtains insurance coverage. Contacts I&M Society and local section for seed money advance loans and handles return of seed money and payment of surplus. Participates in final financial reporting and prepares and submits materials for audit. Assures that an accrual-based financial report is submitted to IEEE by November 30 of the Conference year and final financial report is submitted for audit within one year after the Conference. Failure to close conference books within one year will result in financial penalties assessed against the Conference by IEEE.

Awards - Develops certificates of participation and attendance when specified and responds to individual requests for such material. Obtains specified plaques and monetary prizes for I&M Society awards..

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

Webmaster – Supports conference website with regular input of programs and procedures. Posts call for papers, abstracts received and advance program, an author kit, forms for conference registration and hotel reservation, information and attractions of the conference city and venue and web listing of author materials received..

Publications - Works with the Technical Program Chairman and the Webmaster in preparing and supervising the advance program, the Conference Proceedings and the Conference program - in short, all materials required for the conference. With the Technical Program Chairman, makes certain papers are received in time to be included in the Proceedings. Ensures signed copyright forms that are required from authors to publish their papers are received. Advises authors that any required clearance by a company must be obtained by the individual author(s).

Only accepted papers that are presented at the conference may be included in the Conference Proceedings.

Conference Proceedings are provided at registration to each paid registrant and additional copies are available for purchase during the Conference. Specified numbers of CD ROM or USB drive

proceedings are sent to the IEEE TAB Products for resale after the Conference. Normally, these proceedings are shipped directly from the manufacturer to a designated IEEE location.

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

The Chairman consults with the Arrangements Chairman and the Exhibits Chairman to make certain places and times are correct and listings of exhibitors appear in the Conference Proceedings and the advance and final programs. He obtains from IEEE Headquarters the pertinent IEEE catalog and ISBN registration numbers: this information is available from the IEEE Acquisitions Administrator.

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

- **Cover** - It may reflect the Conference theme or location. The cover must include I²MTC with the two-digit year and a unique catalog number designated by IEEE Conference Services.
- **Title Page and Index** - Name, date, location of conference, Conference Proceedings heading, IEEE catalog, Library of Congress and ISBN registration numbers and sponsors.
- **Reprint Criteria and IEEE Responsibility Statement** - Standard item inside title page.
- **Chairmen's Messages** - Two pages of welcome remarks by General Chairman and Program Chairman
- **Keynote Speaker** - The identity of the keynote speaker, his professional credentials and a general preview of his talk are listed.
- **Conference Committee** - The organization, committee officers and their company affiliations. Also identifies the I²MTC Board of Directors.
- **Special events** - A tutorial schedule is usually included, as is any special tour and the mid-evening gala. A special honor or award presentation falls into this category.
- **Call for Papers** - For continuity, a call for papers for the following year's I²MTC is included.
- **I²MTC History** - Previous I²MTC s and their locations are listed.
- **Table of Contents** - Lists each technical session, with paper titles and authors' information. Author names are hyperlinked to their papers.
- **Author Index** - An alphabetical list of authors and the page(s) on which their paper(s) appear. Author names are hyperlinked to their papers.

The official name of the conference is the IEEE International Instrumentation and Measurement Technology Conference and IEEE must be prominently displayed in all Conference materials. The IEEE logo must appear on the cover and title page of the Conference Proceedings, and in the Advance Program, final program and Call for Papers. Electronic copies of the logo are available from the Conference Coordinator. Instructions on how to use the IEEE logo and suggestions for layout, cover and binding can be found on the web at http://www.ieee.org/conferences_events/conferences/organizers/publishing_conference_papers.html click on Conference Organizers and IEEE Master Brand.

The Advance Program is posted on the I²MTC web page approximately four months before the conference. The program contains a preliminary listing of sessions and accepted papers, Conference technical and social events, features of the conference site and city and other pertinent information.

1.6 Final Program

The final or at-door program is distributed to attendees at the Conference and contains a final program schedule, room assignments, list of exhibitors and information on the keynote address, social activities and any special events. It is not necessary to include registration forms or hotel reservation applications or "how to get to the Conference" information. Messages from the Conference Chairman and Program Chairman are included in the Proceedings and need not be a part of the final program. Sufficient copies of the program are printed to supply all attendees and exhibitors.

2.0 CONFERENCE COMMITTEE

2.1 Composition

The Conference Committee is composed of the chairmen of all committees – Conference Chairman, Vice Chairman, Technical Program Committee, Exhibits, Arrangements, Registration Finance, Awards, Webmaster and Coordinator. The Committee, which exists under the authority of the I²MTC Board of Directors, is the Conference operating and steering authority and is responsible for the staging of all aspects of the Conference. Through the Conference Chairman, the committee reports to the I²MTC Board of Directors. Members of the Conference Committee **must** be IEEE member and members of the Instrumentation and Measurement Society.

3.0 CONFERENCE CHAIRMAN

3.1 The Chairman's Role

The Conference Chairman, under the authority of the Board of Directors, is responsible for all activities and operations concerning I²MTC. His assignment is to select and supervise all committee chairs and to monitor their activities to assure events progress in a satisfactory manner. He presides at committee meetings and is responsible for their scheduling and execution. He is the chief operating officer of the Conference, reporting to the I²MTC Board of Directors.

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

3.2 Chairman's Duties

He is a contact point with the I²MTC Board of Directors. Duties include scheduling Conference Committee meetings, developing meeting agendas and chairing meetings. Frequent communication among the committee members is a key to success. Meetings should increase in frequency as the conference approaches. One year away, alternating monthly meetings of the chairs and all volunteers is acceptable. Six months away, meetings should be monthly for each as a minimum. The conference

chair often is the contact with keynote, luncheon and/or banquet speakers and is responsible for invitations to such individuals. He also is responsible for providing backup speakers in the event scheduled speakers drop out – or ensuring that key speakers provide a replacement if they can't appear.

He is responsible with the Conference Coordinator for filing the Conference Information Schedule with IEEE Conference Services. This form must be received by IEEE before advance funding seed money can be released.

The Conference Chairman, Finance Chairman and Conference Coordinator will oversee the return of seed money, distribution of surplus monies, and filing of the final report and the closing of the Conference bank account.. A preliminary financial report is to be issued within three months after the Conference and an accrual-based report must be submitted to IEEE by November 30 of the Conference year. An audited final report will be completed as soon as all financial obligations are settled and will be submitted to the Board of Directors, sponsors and IEEE headquarters. Final reports and audits not completed within one year of the conference close will result in financial penalties leveled against the conference by IEEE. A professional auditor is required by IEEE for all conferences with receipts exceeding \$100,000. Auditing services are available from IEEE itself or an independent professional may be selected. Selection of an auditor is subject to approval of the I²MTC Board of Directors.

IMPORTANT – For attendees residing in countries outside the conference country, They must be reminded to apply as early as possible for visas – in some countries the process takes up to two months. With heightened security around the world, nearly all nations are beginning to require visas. The Conference Coordinator can notify affected attendees as soon as their registrations are received, in the case of authors when their papers are accepted. The Coordinator handles all invitations to attend the conference when it is in the United States. The Conference Chairman of non-USA conferences must prepare and sign invitation/visa letters.

4.0 VICE CHAIRMAN

NOTE: Alternately, a Co-Chair may be appointed and the duties of Chair and Vice-Chair divided.

4.1 Relationship to Chairman

He is the second-in-command and acts as the Chairman in the absence of the Conference Chairman. He assists the Chairman in his responsibilities and handles specific assignments as requested by the Chairman.

4.2 Activity Coordination

The Vice Chairman coordinates publicity and attendance promotion efforts so that they work in concert to attract the largest possible attendance.

4.3 Specific Responsibilities

He arranges for keynote and any other special speakers and lines up accommodations where needed (if appropriate and necessary, the Conference bears travel and hotel expenses only for keynote and featured speakers). He supervises with consultation of the Arrangements Chair the physical setup for special speaker presentations (including audio-visual). He is responsible for selecting an appropriate memento for the keynote speaker.

The Vice Chairman coordinates seating and other special arrangements for head tables at keynote, luncheon and banquet events. He selects any entertainment featured at the banquet or other activity. If the Conference Committee does not have an Awards Chairman, the Vice Chairman assumes those duties.

5.0 TECHNICAL PROGRAM CHAIRMAN

5.1 Overall Responsibilities

The program is the heart of the Conference and must be of the greatest possible technical and educational value to the instrumentation and measurement community. It must be comprehensive and balanced between papers from industry and academia. The program includes both oral presentations and poster sessions. The Program Chairman, in conjunction with the Technical Committee, chooses the theme for the Conference and organizes the technical sessions. He provides the necessary program information for the call for papers, advance program and Conference Proceedings and advises the Arrangements Chairman of facilities needed for the sessions.

The Chairman has the right of final selection of all papers. He exchanges with the Coordinator regular reports on all abstracts, authors and their affiliations, status in the evaluation cycle, author notifications, final papers received and session assignments.

The Chairman cooperates with the Editor of the *IEEE Transactions on Instrumentation and Measurement* in facilitating the publication of a special issue of the *Transactions*. He makes sure that session chairs complete author evaluation/attendance reports and notifies the Conference Coordinator and Transactions Editor of papers not presented and therefore ineligible for the special I²MTC issue.

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

The Program Chairman will assign reviewers to each abstract. Reviews are returned to the Conference Coordinator and tabulated. The Program Chairman and the Technical Committee will select papers and place them in sessions. An Advance Program will be posted on the web.

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

5.2 Call for Papers

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

The Call for Papers must include the following:

- A statement of the conference theme and suggested topics of interest.
- Abstract due date, author's notification date and due date for complete paper.
- Instructions for preparation and electronic filing of the abstract.
- Notice that if a paper isn't accompanied by a full registration fee and presented at the conference, it will not be published in the proceedings and if it is not presented it will not be eligible for the special issue.
- Direction that authors check the Conference website for the progress of their abstract(s).

The deadline for abstracts should be sufficiently in advance of the Conference to allow ample time for review. Submissions should be acknowledged by e-mail with assignment of a paper number as they are received (the web will list the paper numbers and later accepted papers only will be listed by number to avoid any embarrassment to authors). The Program Chairman must prepare a clear and realistic schedule to allow time for writing, review, corrections and printing. All authors must receive acceptance or rejection notifications no later than the date stated in the call for papers.

5.3 Selection of Papers

The Program Chairman and his committee will determine which papers are suitable for presentation at the Conference and for publication in the Conference Proceedings. Accepted papers are listed by number on the website. Manufacturing of the proceedings in CD ROM or USB drive format begins about one month before I²MTC and all papers should be in hand at least one month prior to printing deadline. The author kit contains early deadline dates for the Proceedings – many authors submit papers later than the published deadline so an early date is recommended to overcome widespread tardiness. Authors are advised their papers will not be included if their material is not received in time.

The IEEE Xplore program is the worldwide dissemination of Conference Proceedings to subscribers. Xplore compatibility requires certain pdf settings and a separate production CD in a different format than the Conference CD. The Conference Coordinator is responsible for Xplore compatibility which requires submission of final papers in Postscript.

The author kit containing Instructions to authors for preparing papers is posted on the I²MTC web.

To assure author attendance and avoid no-shows, the I²MTC Board of Directors requires that all authors/speakers pay the Conference registration fee in advance of the Conference Proceedings deadline in order for their papers to be published in the Proceedings. Papers will not be included unless material is submitted in electronic format with copyright form and full registration form and fees. In addition, policy mandates that a full registration fee must be connected to each paper presented, even if authored and presented by a student, Life Member or other special category of member. In such cases, a student or other category member must pay a full registration. In addition, an author with a full fee registration and who presents more than two papers and does not have co-authors registered must pay a \$50 surcharge for each additional paper.

A list of no-show authors is maintained by the Coordinator and is made available to future program committees and the Transactions Editor. No-show authors are those whose papers have been accepted but who have failed to appear at the Conference and have not arranged for a substitute presenter in advance. A second no-pay list includes authors who have papers published with a guarantee of payment but fail to pay registration fees.

Session chairmen should contact authors in advance of the conference to assure they will be present and advising them of audio visual provided. Unless otherwise specified, A-V equipment is limited to a computer-controlled (LCD) projector and screen, lavalier or podium microphones and pointers. Additional equipment may be ordered at the option - and expense - of the individual author.

At the conference, a meeting should be arranged each morning for the session chairs of the day (both presented and poster session chairs). At this briefing, the rules for conducting a session are reviewed along with handling of missing speakers. In order to preserve paper timing for those interested in attending specific papers, a missing author should NOT cause the next author to start ahead of time. All session chairmen and authors are required to report to their assigned session room at least 10 minutes before the scheduled start of the session for any last-minute information.

5.4 Program Content

The objective of the conference is to give the widest exposure to subjects and authors in the instrumentation and measurement community. Thus, these general ground rules should be followed whenever possible (it is understood that some topics are the expertise of only one or two organizations and exceptions from the following rules can be made in such instances):

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

5.5 Papers per Session

Generally, oral sessions are programmed to last approximately two hours. Each paper typically is allotted a total of 25 minutes; 20 minutes for presentation and five minutes for questions. Therefore, four to five papers can be planned for each session. Session chairs are responsible for limiting speakers to their allotted time and encouraging discussion.

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

5.6 Poster Sessions

Papers may be placed into poster sessions in which authors explain their work to small groups or one-on-one. Papers are posted on bulletin boards - hence the name - and authors meet with attendees in front of the bulletin boards. Poster sessions carry the same technical weight as oral sessions and no differentiation is made in the Proceedings. Papers are published in the Proceedings and eligible for the special issue of the Transactions. It is merely a different mode of presentation than oral sessions and one that appears to be growing in popularity.

The precise size of poster board space must be included in the author kit on the web. The information is treated as critical by poster authors. The Technical Committee Chairman is responsible for selecting volunteers as poster session chairs. A poster session chair is responsible for assuring the following rules are followed for their assigned session.

- Posters should be hung within the assigned space at the beginning of the session.
- The name and photo of the author who is available throughout the session to answer questions must be posted with the paper.
- The designated author should be available for discussing the paper throughout the session.
- All posters must be removed at the end of the session.

5.7 Conference Program

Multiple Tracks – I²MTC generally hosts four or five tracks which accommodate a total of 4 to 6 papers in each regular session and 35 to 50 poster papers in each poster session. The opening session of the conference is a single, or plenary, session setting the tone of I²MTC and featuring a prominent authority in instrumentation and measurement that presents new or far-reaching information of general interest.

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

Tutorials - Applications-oriented workshops can provide excellent background and new developments in a subject. Tutorials are presented on the first day of the conference but are not included in the conference proceedings.

5.8 Special Issue of the Transactions

Production and publication of accepted and presented papers in a special I²MTC issue are coordinated with the Editor of the *Transactions* and, where specified, a Guest Editor.

6.0 EXHIBITS CHAIRMAN

6.1 General Responsibilities

The heavy academic flavor of I²MTC does not attract a large exhibits following but rather publishers and software houses and instrumentation and measurement companies introducing new concepts or seeking assessments of new applications. If a conference elects to include exhibits, the nature of the displays and the academic tenor must be made known to potential exhibitors.

The Exhibits Chairman should be knowledgeable about the technical aspects of the Conference and should be familiar with companies which are in a position to support the conference. He is responsible for selecting the exhibits area, establishing exhibiting rules and regulations, selling exhibit space, assisting in setting up exhibits and supervising exhibit activities.

There are two types of exhibits booth: 1. A standard 10x10-foot area with back and side drapes and power and 2. A special 6x8-foot display for literature which does not have electrical power.

A detailed budget will list the price of each booth space and estimate the number of booths that may be sold. It should indicate the cost of the gross exhibition area and facilities, the cost of electrical power, decorator service, signs, drayage and warehouse services, security guards, insurance and the cost of sales (promotion, printing, mailing, telephone and fax calls). The budget may also include the cost of one full Conference registration per exhibiting organization.

Exhibiting at I²MTC is covered by contract and is limited to instrumentation and measurement products and services, including publishing in the areas of instrumentation and measurement and related applications. I²MTC excludes exhibiting companies and organizations in other industries.

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

6.2 Application and Layout

The Exhibits Chairman obtains the exhibits application and rules and regulations contract from the Conference Coordinator and recommends any changes to fit the conference site. In advance of the conference, the Chair sends a message to exhibitors with this information:

- Time and location of the conference, general attendee profile, preliminary plans, days and hours of exhibiting and cost per booth
- A copy of the exhibit and rules and regulations.

6.3 Setup and Teardown

The Exhibits Chairman is available throughout setup to handle any problems that may arise during that time. Exhibits personnel receive badges at the Conference Registration Desk.

7.0 TUTORIAL CHAIRMAN

7.1 Role of Tutorials

Applications workshops featuring state-of-the-art information on instrumentation and measurement technology offer another dimension to I²MTC activities. Tutorials are presented the first day of the Conference to avoid any conflict with I²MTC sessions.

7.2 Partnership with Conference

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

The Tutorial Chairman contacts selected tutorial developers for outlines of what the courses will cover and what will be involved in the presentations. He relays this information to the Program Chairman and Coordinator. Tutorials are regarded and advertised as the first day of the conference. Full conference registration includes registration for all of the tutorials. At the discretion of the organizing committee, a “one day” tutorials only registration may be offered. The Instrumentation and Measurement AdCom considers the tutorial program to be a platform for inviting industrial involvement in I2MTC. Tutorials should be included in the Continuing Education Unit and Professional Development Hour (CEU/PDH) credit program offered by I2MTC. Recent history suggests that tutorial attendance should be expected at about one third (33%) of the full conference registration. To effectively use the CEU/PDH program, there is a need to promote the availability of CEU/PDH credit to a wider audience. The typical individual needing CEU/PDH credit is a registered (chartered) engineer in US or Canadian practice (P.E. or P. Eng., respectively). A large audience is available through publications of NSPE, Engineers Canada, US state and Canadian provincial/territorial organizations.

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

- Define general tutorial topics by end of October (according to conference theme).
- Identify tutorial speakers by end of November
- Identify tutorial titles by end of December; publish titles, presenters, and tentative schedule on I2MTC conference website by end of December.
- Complete all presentation materials and copyright assignments by end of March.

8.0 ARRANGEMENTS CHAIRMAN

8.1 Overview

The Arrangements Chairman has responsibility for recommending appropriate hotels, arranging and supervising meeting facilities (including evaluating meeting rooms for acoustics, ceiling heights and air conditioning), hotel reservations (and social activities, including meal and food functions and guarantees). He assigns meeting rooms, luncheons, banquets, exhibit hall, registration area and any other facility within the hotel. He specifies needed equipment and supplies and handles audio-visual needs, coordinates any Conference-controlled hospitality activities (such as a Conference Committee-VIP lounge), obtains necessary tables and chairs and coordinates overnight storage of cash boxes, computers and valuables. He works with the hotel to develop reservation policy/procedures.

Contract negotiations with the Conference facility may be conducted by an independent site selection firm experienced in arranging I²MTC conferences or by the office of the Conference Coordinator. If a site selection firm is used, it must be paid by the facility so there is no financial impact on I²MTC. All contracts are approved by the Arrangements Chairman, the Coordinator and by IEEE Conference Services before signing. A final version of the contract must be submitted to Vita Feuerstein at IEEE Conference Services (v.feuerstein@ieee.org).

Remember, the I²MTC Board of Directors must approve in advance any commitment of funds exceeding \$3,000. The Conference Coordinator has been authorized by the Board to act as its agent in

this process and he must be consulted before major commitment of funds is made. These commitments include, but are not limited to, hotel/facility contracts, social and special events.

In most cases, hotel meeting room rental fees are based on the number of sleeping room nights recorded and fees are reduced or waived if certain levels are achieved. These levels must be stated lower than anticipated. A general rule: Meal guarantees should be based on a rate of 85 percent of Conference registrants the first day, 75 percent the second day and 50 percent the third day. In dealing with a conference facility, it is vital that only the Arrangements Chairman and the Conference Coordinator be authorized to approve instructions and to change existing specifications during the conference -- other committees should attempt to provide 24 hours' notice for any new arrangements. . This arrangement helps avoid conflicting instructions going to the facility. Further, it is critical that only the Arrangements Chairman and/or the Conference Chairman and Conference Coordinator authorize any conference-charged expense at the host hotel.

8.2 Support of Technical Program

Working with the Program Chairman and the Tutorials Chairman, the Arrangements Chairman determines at least one month in advance the needs of the various speakers for audio-visual or other equipment. This can include lavalier or podium microphones, lecterns, laser pointers, blackboards and screens. The Instrumentation and Measurement Society owns six LCD computer-powered projectors and six laptops; they are available as needed to I²MTC. The committee should be prepared to provide a laptop computer for every LCD. The Chairman should make certain there are pads, pencils, water and glasses in the session rooms. Whenever possible, session rooms should be set classroom style. He arranges for signs — at the registration desk, the entrance(s) to the exhibit area, at the door to session rooms and where other directional indications are needed (the number of signs is determined by the Arrangements Chair in consultation with pertinent chairs - a representative checklist of signs is contained in Figure 14). Signs should be determined 30 days in advance to avoid at-conference confusion and extra work in a time-critical period. Even with careful planning, there are last-minute changes and a sign-making computer program should be available to handle these emergencies. He makes certain the conference is listed on the hotel or facility meeting board and outside marquee for the day(s) and checks their accuracy each morning.

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

It is difficult to estimate beforehand which sessions will have the greater attendance. Try to select facilities offering some flexibility in meeting room size. It a real advantage to be able to expand a room set for 50 people to accommodate 75 – or to pull off the reverse.

8.3 Sleeping Rooms

In the US, a block of sleeping rooms must be booked in the Conference headquarters hotel to accommodate out-of-town attendees. Be careful to not obligate the Conference in a contract for more hotel rooms than I²MTC history indicates are needed as such action could have a negative financial impact if the room count falls short. The growth of on-line hotel reservation services has had an effect on the number of sleeping rooms used at the headquarters hotel. Lower rates can draw conference attendees away from the main hotel. It is strongly recommended that an agreement be sought with the hotel to review reservations prior to the Conference as some Conference attendees may book rooms

without advising they will attend I²MTC. It is suggested to book a small number of overflow rooms in a nearby hotel (or have an arrangement with the headquarters hotel for overflow) in the event of a larger-than-anticipated crowd. It is helpful to identify a nearby low-rate hotel or motel to accommodate attendees from developing nations who cannot afford conference hotel rates - this facility is not advertised but information is provided on request. Normally, unreserved sleeping rooms are held until 30 days before the conference and then are released to the general public. Attendees attempting to reserve rooms after that date are handled on a first-come basis.

In a special category are members of the I²MTC Conference Committee, the I&M AdCom, top IEEE officials and the keynote speaker. The Arrangements Chairman supplies names of these people to the hotel so they can be placed on a VIP list to be assured upgraded accommodations.

8.4 Social Functions

Social functions require the Arrangements Chairman to schedule luncheons and receptions and pick the menu and deal with tickets to functions – it is critical to collect meal tickets from attendees during meal functions as they can be used to verify served meal count. Most hotels require a guarantee two to three days in advance of the number of meals to be served - try for a 48-hour notice for guarantees but settle for no more than 72 hours. Guarantee on a conservative basis; the hotel prepares for 5 percent more than the guarantee. Remember, attendance drops after the first day and be aware some attendees skip meal functions altogether. There is no foolproof rule of thumb, although many meeting planners guarantee 85 percent of total registrations the first day, 75 percent the second and 50 percent the third.

It is recommended as best practice to serve conference meals as plated meals rather than buffet meals. This controls portion size and reduces waste. Cost for drinks should be controlled by either limiting the time a bar is open or providing a fixed number of drinks gratis using tickets. Wine with the Gala dinner should be served by staff to avoid waste of unused open bottles. The IEEE recommends reducing the number of meals and receptions to maintain the required income to expense ratio to deliver a 20% financial surplus.

8.5 Operational Support

The Arrangements Chairman meets with hotel convention services, sales and catering personnel prior to the Conference to review banquet event orders and to advise of special circumstances, including

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

Hotels usually have business centers with facilities for photocopies, fax, computer printer and modem availability for e-mail. The Conference hotel should have wired internet ports or wireless capability in sleeping rooms.

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

Working with the Coordinator, the Arrangements Chairman handles arrangements for any related non-conference meetings, such as the I²MTC Board of Directors, Society AdCom, technical committees or special project groups. The Conference Coordinator is the source for meeting information regarding the I²MTC Board of Directors and Society AdCom. Technical committees should be contacted via the Society Technical and Standards Chairman in advance to determine any meeting needs. It is advisable to have several spare meeting rooms to accommodate technical and other committees of the I&M Society which may hold meetings in connection with I²MTC – and in many cases these groups ask for meeting space at the “last minute.”

9.0 REGISTRATION CHAIRMAN (optional- usually the duty of the Conference Coordinator)

9.1 General Information

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

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

Registration fees are set by the I²MTC Board of Directors.

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

Categories include IEEE member advance, IEEE member at-door, IMS member advanced, IMS member at door, non-member advance, non-member at-door, student/life member advance, student/life member at-door. The Instrument and Measurement Society AdCom has required that IMS members be given a \$30 discount below IEEE members.

I²MTC policy requires that there be a full fee registration connected to every paper presented at the conference. If a student or Life Member is the only author of a paper attending, he will be required to pay full registration. Student/Life Member rates are allowed when there is a co-author present who has paid full registration. Authors presenting more than two papers without a co-author registered are required to pay a surcharge of \$50 for each additional paper.

The Registration Chairman and the Coordinator will determine if attendees will receive registration bags. Attendees receive badges, holders, conference receipt, certificate of participation and banquet and luncheon tickets with the Conference Proceedings and tourist material from the host city or its

tourist agency. Registration prepares packages for VIP attendees and, if pertinent, secures "exhibits only" credentials for guests invited by exhibitors.

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

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

9.2 Registration Desk

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

Registration carries out the following:

- Hand out advance registrations.
- Accepts completed registration forms and fees for at-door registrants.
- Prepares badges and presents badges, luncheon and banquet tickets to registrants.
- Receives payment and makes a receipt for each transaction. Payment may be made by check, bank transfer or credit card – Visa, MasterCard and American Express. The Registration Chair and Coordinator are responsible for managing cash disbursements and for keeping accurate and current financial records.

9.3 Registration Form

A combined registration form – author and attendee – is posted on the web. The attendee form includes reduced fees for students and life members, the author registration does not. These forms may be downloaded and submitted by mail, fax or e-mail. The form varies little from year to year with changes essentially in fees and the location, dates and special activities. This allows consistency and continuity and ease of handling.

9.4 Handling Funds

Arrange to deposit cash, checks and credit card slips in a safe deposit box provided by the hotel.

The Registration Chairman should be available at all times to answer questions and handle emergencies. Approval of the Registration Chairman is required for issuance of complimentary passes

for the working press, furnished upon presentation of credentials. After the conference, the Conference Coordinator prepares a list of attendees and their full addresses, phones, faxes and e-mail addresses. Copies are furnished to the Conference Chairman for his final report and to next year's Registration Chair. Upon request, a copy may be given to an exhibitor.

9.5 Supplemental Tours and Activities

The Registration Chairman is responsible for non-conference social activities. Tours, shopping guidance and other programs are available through the hotel concierge, a local tourist bureau or a commercial company - and an announcement of availability should be made well enough in advance so an appropriate paragraph may be included in the advance program and other announcements. A guiding principle: All tours and social functions should be self-sustaining. The Registration Chair should have a menu of activities to help visitors make arrangements to take part on an individual or group basis.

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

10.0 FINANCE CHAIRMAN

10.1 General Information

The Finance Chairman is the chief financial officer and controller. He teams with the Coordinator who maintains the Conference bank account and has in place a system for safeguarding and accounting of all funds received prior to the Conference from pre-registrations, exhibits fees, tutorials and advances from sponsors and for monies received during the conference from registration fees and ticket sales. With the Coordinator, he submits mid-course budget figures to IEEE. He is responsible for a quarterly financial report and updating budgets and compiling a final financial accounting. He and the Conference Coordinator are responsible for submitting an accrual-based financial report to IEEE by November 30 of the Conference year.

An Excel spreadsheet has been developed to calculate the I²MTC budget based on attendance projections, function costs and fees. The spreadsheet program is available from the Conference Coordinator.

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

The Finance Chairman and the Coordinator will develop a budget to indicate all anticipated receipts and expenditures (to be approved by the Conference Committee) and will provide that budget to the sponsor and co-sponsors.. Budgets will be updated annually and submitted to the I²MTC Board of Directors and IEEE. The conference will budget for a surplus 20 to 35 percent of expenses.

10.2 Bank Account

The Finance Chairman will work with the Conference Coordinator to set up an IEEE Concentration Bank account to handle funds received and to disburse payments. The Finance Chairman, the Conference Chairman, and an executive from IEEE Headquarters are empowered to sign checks. The IEEE executive should sign checks only in an emergency. The Conference Coordinator will be responsible for monitoring all receipts and disbursements from this account and performing account reconciliations. There should not be a separate local bank account unless explicitly approved by the I2MTC Board Chair.

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

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

10.3 Insurance

The Finance Chairman and the Conference Coordinator are responsible for insurance coverage (through IEEE for the conference to protect I²MTC and its sponsors from accident claims or losses. The forms are avail/able through the Coordinator's office. A request for conference insurance form must be filed with IEEE to obtain the following coverage free of charge:

- Bonding of conference officers and employees - \$1,000,00 (\$2,500 deductible)
 - Rental of equipment - \$25,000 limit (\$250 deductible)
 - Liability and property damage - \$1,000,000 and \$7,000,000 (no deductible)
 - Limited volunteer personal liability - \$100,000 (list committee members covered)
- In-and-out robbery coverage - \$25,000 limit and \$2,500 deductible) - is available through IEEE at a cost of \$125.

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

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

10.4 State Tax Exemption

Some states of the United States allow sales tax exemptions for IEEE conferences. If I²MTC is held in a state where an exemption is allowed, the Finance Chair must provide the conference facility and other suppliers with a sales tax exemption certificate.

10.5 Payment of Bills

Bills should be approved by authorized committee chairs and forwarded to the Finance Chairman for approval and then to the Conference Coordinator for payment. While every effort must be made to stay within the budget, the Finance Chairman may approve any bill authorized by the appropriate chairman which does not exceed a committee's specific budget by more than 10 percent (larger excesses must be approved by the Conference Chairman and in certain cases, the I²MTC Board of Directors).

10.6 Refunds

The Finance Chairman, Conference Chairman, Exhibits Chairman and Registration Chairman will recommend a policy for registration refunds (but only after a credit card transactions is approved by the issuing agency or a check clears the bank) for approval by the Conference Committee. Refunds can be held to a minimum if a cut-off date for refund requests is publicized in appropriate promotional literature. Requests for refunds after the deadline date will not be honored. Refunds should be avoided if possible but a recommended policy is 100 per cent refund 100 or more days before the conference, 75 percent 75 days before and 50 percent between 30 and 50 days. Fewer than 30 days no refunds are authorized except in documented medical or family emergencies.

10.7 Independent Contractors and Award Recipients

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

Items included are:

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

Types of payments to be reported:

1. Travel awards paid without obtaining an expense report with supporting receipts for invited speakers, attendees, students, etc.
2. Prizes or awards for papers, service, etc.
3. Consultant fees paid to an individual or unincorporated business

10.8 Reports and Audits

A preliminary financial report will be filed within three months, an accrual based account by November 30 of the conference year and a final audited report will be submitted to the Board of Directors, sponsors and IEEE headquarters as soon as possible thereafter, but realistically six months to a year after the conference. The report shall give a clear picture of the number of registrants, the fees they paid, the number of tickets sold for social events and detailed information about expenditures. Conferences must issue final reports and close all books within one year or financial penalties will be assessed by IEEE; additional penalties will be imposed if closing is delayed.

All IEEE conferences with receipts exceeding \$250,000, and I²MTC meets this specification, are subject to a professional audit. IEEE offers auditing services for a reasonable fee or an outside independent professional may be used. Auditor selection is subject to approval of the I²MTC Board of Directors or the Conference Coordinator.

11.0 AWARDS CHAIRMAN

11.1 Awards Process

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

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

11.2 Specific Award Participants

The Chairman develops a specific list of proposed award recipients based on suggestions from other chairmen. He assures the development of an appropriate certificate design, supervises the printing of that certificate and arranges for the inscription of the certificates to be completed in advance of the conference.

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

12.0 PUBLICITY CHAIRMAN

12.1 General Information

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

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

The I&M Magazine is an excellent outlet for information on I²MTC - throughout the year -- as are the local section publications. In the field of the technical press, there is the IEEE Spectrum, Electronic Engineering Times, Electronics, EDN, Electronic Design, Evaluation Engineering, Cal Lab, Test and Measurement World and many others..

Don't ignore local news media - but don't expect to see reporters and cameras. The major exception would be a newsworthy speaker or topic relating to public interest. Material should reach trade journals two to three months prior to the event - an initial announcement and Call for Papers should go to the media as soon as they are mailed to potential speakers. Local news media should be contacted one week before I²MTC.

12.2 Mailing Lists

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

12.3 Attendance Promotion

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

13.0 WEBMASTER

13.1 General Information

I²MTC has an official website – <http://imtc.ieee-ims.org> – which is a doorway to all information about current, future, and past conferences. The website has basic information about I²MTC, a history of locations and dates and links to the current conference, the immediate past conference and the immediate future conference.

Individual conference committees may operate their own websites within rules of operation set down by the Board of Directors. However, all I²MTC conferences must link in a consistent manner to the homepage site to provide continuity and easy contact.

13.2 Web Operations

Each committee must designate a website coordinator to manage and post material to the individual conference webpage. It is critical that the website be under the direct control of the I²MTC organization and not assigned to third party supervision. If the conference committee cannot identify a webmaster, the Conference Coordinator will be consulted to help identify a suitable candidate.

13.3 Web Content

The next-up I²MTC is the focus of the web and receives central attention. The future and the past are not forgotten, but must not upstage or compete with the current conference.

Next I²MTC – This Conference is the next event in the I²MTC schedule and contents of the web include:

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

Last I²MTC – This is the immediate past event:

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

Future I²MTC – *What the future holds:*

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

14.0 Conference Content

The current year I²MTC Organizing Committee is responsible for defining the day to day content and flow of I²MTC. However, certain elements are expected to be present and there are best practices to be considered. Specifically, the conference contains the following elements:

14.1 Tutorials Day

Contents and flow of the day are explained in the Tutorials Chair responsibilities.

14.2 Opening Day of the Conference

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

14.2.1 Session Chair's Meeting

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

14.2.2 Welcome and Announcements by the Organizing Committee

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

14.2.3 Keynote Speaker(s)

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

14.2.4 Presented Paper Tracks

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

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

14.2.5 Poster Sessions

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

14.2.6 Exhibits

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

14.2.7 Welcome Reception

The traditional welcome reception is at the discretion of the organizing committee. The cost must be controlled to assure a successful budget. Pay particular attention to food and beverage distribution.

Consider whether the reception will be treated as a meal by participants or as appetizers. Control alcohol consumption through bar hours or tickets.

14.3 Day 2 of the Sessions

14.3.1 Session Chair Meeting (repeat of day 1 for current day's session chairs)

14.3.2 Announcements

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

14.3.3 Keynote

Consider another keynote if the theme and opportunity permits.

14.3.4 Presented and Poster Session continue as in Day 1

14.4.2 Award Lunch

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

14.3.5 Exhibits

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

14.3.6 Gala Dinner

The optional but recommended dinner on the second night of paper sessions is intended as a social event. It is an opportunity for colleagues from around the world to meet and talk. The dinner should be served plated to control portions and minimize queues. Wine may be provided with dinner. It is suggested that the wine be poured by serving staff to minimize waste. Entertainment should be provided, but the form and content is entirely at the discretion of the organizing committee.

14.4 Last Day of the Conference

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

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

14.4.3 Closing Ceremonies

After the last session, assemble participants for a brief ceremony. Thanks the participants, organizing committee, conference coordinators, and others for their help. Introduce the next year's I2MTC Organizing Committee and provide a few minutes for them to promote the conference.