

**IEEE Electronics Packaging Society
(EPS)**

Conference Organizers Handbook

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Introduction

The IEEE Electronics Packaging Society (EPS) is one of 38 societies within IEEE. As a conference organiser, we encourage you to become familiar with the EPS field of interest, conferences, technical committees, and our local chapters. Working with these committees and chapters will help you reach out to EPS members locally, as well as develop a high quality technical programme. Further details of these can be found on the following society webpages:

- About EPS and our Field of Interest: <https://eps.ieee.org/about.html>
- EPS Conferences: <https://eps.ieee.org/conferences.html>
- EPS Technical Committees: <https://eps.ieee.org/technology.html>
- EPS Chapters: <https://eps.ieee.org/chapters.html>

Conferences are an important forum for our members to meet and disseminate the latest advances in the EPS field of interest. As a society, we sponsor conferences both financially and technically (e.g. no financial involvement). Details for the different types of sponsorship that we engage in (sole, financial co-sponsor, technical co-sponsor) can be found on the EPS conference webpage (<https://eps.ieee.org/conferences/eps-conference-sponsorship-relationships.html>).

This handbook together with the timelines in the attached spreadsheets (see Appendix A & B) provide information and details of the requirements that conference organizers should note and follow. Adhering to these timelines will ensure that we can support you to deliver a successful event both for you as organizers, conference attendees, and the society.

EPS contacts

If you have any questions related to this handbook, the conference timelines, or any other queries, then please contact the EPS Executive Officer and the VP Conferences. We are here to help.

EPS Executive Director: Denise Manning (d.manning@ieee.org)

EPS VP Conferences: Sam Karikalan (sam.karikalan@broadcom.com)

Conference Timelines

Appendix A and B provide copies of the timelines for financial sponsored and technical co-sponsored conferences. These two spreadsheets can be found on the [EPS conference resource page](#). This page also provides links to relevant information and forms that you will find useful.

We request that you aim to follow these timelines as closely as possible. This will ensure that we have time to promote your event in our newsletters and on the website.

There are additional requirements (e.g. budget, pre-financing, etc.) that will need to be agreed for financial sponsored events and hence we request that you start the process at least 18 months in advance of the conference if possible.

Important activities for all types of sponsorship are:

A) Pre-Conference:

- Registering conference with IEEE
- Signing memorandum of understanding (MoU)
- Submitting IEEE conference publication form

B) Post-Conference

- Submit conference proceeding to IEEE Conference Services
- Submit final report and close conference

Links to information and forms for the above are in the timeline spreadsheets.

Pre-conference activities: for financial sponsored conferences, we request that the above pre-conference activities are completed 18 months before the conference where possible. For technical co-sponsored conferences, we request that these items are completed 12 months before the conference where possible. Again, quick action on these items will help us promote the event effectively in our newsletters and through the website.

Post-conference activities: for financial sponsored conferences, it is important for the society to close the conference within 6-months (this requires submission of a financial report). For all types of sponsored conferences, we request that organizers submit the proceedings to IEEE conference services one month after the conference. The proceedings will then be placed on IEEE Xplore®.

Adhering to the timelines detailed in the spreadsheets will help us support you in making the conference a success. Your help with this will support the society in ensuring that our conference portfolio is the healthiest and strongest throughout the IEEE.

Naming of an IEEE Conference

The following policies shall apply to the use of the term “IEEE” in the names of conferences:

The term “IEEE” shall be used in the names of sole sponsored and co-sponsored conferences where IEEE is at least a 50% financial sponsor (in total for all IEEE co-sponsors).

The use of the term “IEEE” in the names of co-sponsored conferences in which IEEE is less than a 50% but at least a 25% financial sponsor (in total for all IEEE co-sponsors) is recommended but not required.

The term “IEEE” shall not be used in the names of co-sponsored conferences in which IEEE is less than a 25% financial sponsor (in total for all IEEE co-sponsors). This includes conferences in which IEEE is only a technical co-sponsor or is not a sponsor in any form.

Exceptions to the above can only be granted by approval of IEEE Meetings, Conferences & Events (MCE).

Types of Sponsors

IEEE organizational units (OUs) can provide sponsorship to conferences by contributing in the conference's technical program and sometimes through financial investment.

Conference sponsors are the organizations responsible for the financial, technical, publicity, and administrative running of the conference.

At least one sponsor of an IEEE conference must be an IEEE organizational unit or an IEEE society, region, section, chapter, council, or committee. Not-for-profit, non-IEEE entities (association, society, university, etc.) may also serve as sponsors of IEEE conferences.

Conferences can have financial or 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 responsibility. They actively participate in the conference technical-program committee, but accept no financial or legal liability for the conference.

Depending on whether the IEEE organization has financial or technical sponsorship, you can have:

- Sole sponsorship
- Co-sponsorship
- Technical co-sponsorship

Organizations can support an IEEE conference in ways other than sponsorships, including as:

- Partners
- Contributors
- Patrons
- Supporters
- Publicity
- Keynotes
- Exhibitors

This support can take the form of direct grants, paid advertising in the event program, services provided in exchange for brand exposure, underwriting a specific activity (breaks, lunch, etc.), and providing attendee gifts, among other ways. Get creative and get more engagement.

These supporters should be noted separately on the conference materials and website to distinguish them from financial and technical sponsors.

Conference Organizing Committee

Guidance on roles and responsibilities within a typical conference organizing committee can be found at the following link:

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

We are not suggesting that your organizing should follow these guidelines exactly as we recognize that each conference based on its size may have different requirements.

To ensure that the society is represented within the conference organizing committee we require that at least one member is an EPS member.

Engaging with our Technical Committees, Chapters, and Distinguished Lecturers

Our technical committees contain a wealth of expertise, and our local chapters can help you to reach out to EPS members locally. Where relevant, we encourage you to contact and work with these committees and chapters. They are there to support you and will help maximise the technical quality of your conference as well as promote it to EPS members locally. Further details on our technical committees and local chapter contacts can be found at:

- Technical Committees: <https://eps.ieee.org/technology.html>
- Chapters: <https://eps.ieee.org/chapters/chapters-by-region-list.html>

EPS has a list of Distinguished Lecturers (DLs) who may be able to support your event through invited presentations. Our list of our DLs can be found at:

- <https://eps.ieee.org/education/distinguished-lecturer-program.html>

Conference Registration Opt in Wording

To ensure consistent wording among EPS flagship conferences during registration, the following opt in clauses are recommended to be included on the registration page:

* I would like to receive information from “CONFERENCE NAME” events about current and future events

* I would like to receive information about the Electronics Packaging Society (EPS) membership and events

* I would like to receive information from “CONFERENCE NAME” and EPS partners (for exhibitors and sponsors)

Conference Paper Peer Review Guidelines

To make sure that the papers presented and published in the EPS conferences are appropriately peer-reviewed and are in a format that can be easily enhanced for publication in IEEE journals such as Transaction on CPMT, the following guidelines shall be followed all the financially sponsored conferences of EPS for accepting and peer-reviewing abstracts (where applicable) and paper manuscripts, before publication:

Abstracts:

1. Each abstract shall have the following structure (maximum length 2 pages):
 - a. Background /Originality (50 – 100 words)
 - *What is the problem or research question the paper addresses?*
 - *Statement on impact of paper*
 - b. Methodology / Description of the Research (150 – 300 words)
 - *What research methods were used to solve the problem?*
 - c. Results (150 – 300 words), including at least one figure or table or both
 - *Details of the results / findings, including the impact of those results*

2. Each abstract received shall be reviewed and scored by at least three technical committee members of the conference organizing committee, that are expected to be subject matter experts in the theme of the conference
3. Authors of all accepted abstracts shall be informed on a “Conditional Acceptance” of their abstract that will be tied to the successful passing of their manuscript through the final peer review process

Manuscripts:

1. Paper manuscripts shall follow the IEEE Conference Paper template at <https://journals.ieeeauthorcenter.ieee.org/create-your-ieee-journal-article/authoring-tools-and-templates/tools-for-ieee-authors/ieee-article-templates/>
2. The final manuscript shall have a total page length of 4 to 8 pages, including figures, tables and the list of references.
3. Each manuscript shall be thoroughly reviewed by at least two subject matter experts in the technical area of the paper, for technical correctness and no commercial content. These experts can be invited from outside of the conference organizing committee as well, if needed.
4. Appropriate feedback and questions from each reviewer shall be communicated to the author(s) in a timely manner, so that the author(s) have sufficient time to revise the manuscript and/or respond to the questions, as needed.
5. Multiple rounds of reviewer feedback and manuscript revision may be needed, in certain cases.
6. All such iterative revision processes shall be documented, before the final decision on accepting the manuscript or rejecting it and communicating it to the author(s).
7. If a paper is rejected for not successfully making through this review process, the reason(s) for such rejection shall be communicated to the author(s) in the final communication.

Conference Award Guidelines

- Recipients of the awards may truly represent various segments of contributors to the conference in appropriate proportions – such as with a proper Academia / Industry / Research Institution Ratio
- Candidates for awards may be down-selected after duly considering one or more of the following
 - Ratings from paper reviewers (before presentation)
 - Ratings from session chairs (after presentation)
 - Ratings from attendees (after presentation)
- Further grading and ranking of down-selected candidates may be based on inputs from a committee with at least five members of Organizing Committee, including the Technical Program Chair and the General Chair
- No reviewer may grade / rank papers from self or own company / institution to avoid conflicts of interest

- Candidates picked for awards by corporations/institutions, when those awards are sponsored by them, may be reviewed by Technical Program Chair and General Chair to make sure that there is no conflict of interest
- Final list of all award recipients may be reviewed and approved by entire Organizing Committee, by a simple majority
- All conferences that are financially sponsored by the EPS, shall recognize such sponsorship by imprinting the words “IEEE Electronics Packaging Society is a proud sponsor of the <Conference name>” as a footnote on the certificate

Virtual Conference Event Guidelines

With the experience of navigating through the COVID-19 pandemic in 2020 and 2021, the following guidelines are offered to EPS sponsored conferences on organizing a fully virtual or a hybrid (having both in-person and virtual components) event, using digital platforms/tools:

4. When an existing in-person conference that is financially sponsored by the EPS needs to be canceled or converted into a fully-virtual or a hybrid event, please immediately contact the EPS Executive Director, Denise Manning, at d.manning@ieee.org for coordinating with the IEEE Meetings Conferences Events (MCE) organization’s Event Emergency Response Team (EERT) on all mandatory follow up actions. A revised budget also needs to be approved by the EPS for all events that are changing formats.
5. The EERT will be able to help with the planning of the transition to the new format with minimum impact on the quality and finances of the conference, including the negotiation with the venue that was pre-booked for the event on cancellation fees and securing insurance coverage towards the expected financial losses, where available.
6. In general, use the following IEEE resources for guidance on organizing and conducting events on virtual platforms. These guides cover topics such as time required for planning, choosing a virtual event format, scheduling, promotion of the virtual event, and execution, among others:
 - a. IEEE Virtual Events Guide, published by the MCE, available at <https://ieeemce.org/planning-basics/virtual-hybrid/introduction-to-ieee-virtual-events/>.
 - b. Virtual Conference Resource Guide & FAQs, published by the IEEE Computer Society, available at <https://www.computer.org/conferences/organize-a-conference/organizer-resources/hosting-a-virtual-event/cs-virtual-event-resource-guide>
7. EPS recommends that all conference organizing committees may be prepared with dedicated volunteer resources to run the virtual portion of their conferences, as the logistics that need to be taken care of for the virtual events are very unique and different from the ones for in-person events.
8. Key logistics challenges that need to be taken care of for a virtual event include the following:
 - a. Hardware Infrastructure at the venue, for hybrid events
 - i. Make sure that there is sufficient internet bandwidth for live streaming of video feeds and/or recordings

- ii. In the case of parallel sessions, the available facility should be able to cater for the total aggregate bandwidth needs for all simultaneous streaming
 - iii. Use wired Ethernet connections to the computers used for streaming, to keep the streaming independent of the facility's WiFi that could be overloaded by in-person attendees
 - b. Timely decision on engaging with a streaming and hosting partner, depending on the size of the virtual event, and coordination with that partner on the following:
 - i. Recordings of presentations, if they are not going to be streamed live for logistics reasons
 - ii. Training of presenters, including authors and session chairs, on how to record and submit their presentations (if needed) and how to join the virtual event and participate in any live content such as Q&A
 - c. Selection of the right virtual platform and/or live streaming tool and making sure that the required tool licenses are in place for the required pre-event and post-event durations
 - i. Conferences engaging with a third party digital events /streaming partner may need to go with the platform /tool recommended by that partner
 - ii. Conferences with Exhibits and Sponsors should also consider the ability of the platform /tool for virtual exhibitions and sponsor visibility, with good user experience
9. The following are the recommendations from the EPS on the virtual platforms and streaming tools, based on the first-hand experiences of our conferences in 2020/21 and inputs from other IEEE entities such as the MCE:

No. of Virtual Attendees Expected	Recommended Tools for handling virtual elements of the events		Third-Party Streaming Partner	Expected cost (as of Feb 2021)
	Platform for Storage of Recordings and Streaming	Tool for Live Streaming		
300 or Less	Choice of Conference Organizing Committee	Zoom	None	~USD 1,500
301 - 1000	Whova	Zoom	Whova	~USD 5K
1000+	Engagez	Zoom	IEEE MCE	~USD 30K+

The actual cost will vary, depending on the services received from IEEE MCE or Whova and the number of months for which the tools are licensed. Contact the EPS Executive Director, Denise Manning, at d.manning@ieee.org, for details on how to engage with IEEE MCE or Whova and/or for checking if there are any current discounted pricing options available for tool licenses.

10. Enabling conference attendance virtually on a digital platform helps widen the reach of the conference to more audiences worldwide that otherwise may not have a chance to attend the event in person. The registration fee for such virtual attendees should be set such that the conference is financially sustainable in the long term and the fee is commensurate to the technical value received by the attendee. In this regard, EPS recommends the following registration fee structure:
- a. For Hybrid Events:

- i. In-person attendees may have their registration fee set by the regular pricing model of the respective conference, including author and IEEE member discounts
 - ii. All authors may be required to attend in person only or asked to pay an in-person registration fee even if allowed to present virtually
 - iii. Non-author virtual attendees may pay 60~150% of what an in-person attendee pays for a given category, depending on their access privileges to the contents of the conference and the additional expenses the conference may incur for enabling remote attendance. Such additional expenses could range anywhere from just the cost of “virtual tool licensing and Internet access”, if the remote attendance is enabled through Zoom sessions managed by the session chairs, to ~USD 20K+/room/day, if the sessions are live streamed to the remote attendees for better user experience and minimum technical challenges.
- b. For 100% Virtual Events:
- i. The registration fee for all attendee categories may be set in the 30~60% range, when compared to the typical in-person event.

Conference Key Performance Indicators

IEEE undertakes quarterly health checks on the conference portfolio of each of its societies. Below is the recent health check on the EPS portfolio.

Current Statistics				
	IEEE Benchmark	Average IEEE S/C	EPS	
Avg Time to Accounting Close (Months)	6	8.9	7.7	
Average Net/Exp Ratio	20%	23.56%	21.45%	
Avg Time to Publish (Days) - All Conferences	30	57.6	42.7	
Avg Time to Publish (Days) - TCS Conferences		53.2	40.5	
PDFs/Conference	N/A	112	92	
Downloads/PDF	N/A	197	204	

Key performance indicators used to monitor the health of our conference portfolio are:

- *Average time to close:* The IEEE benchmark is 6 months. Hence our request that all post-conference reporting is completed within 6-months. For technically co-sponsored events, the only post-conference activity is to submit the conference proceedings to IEEE conference services. Hence, we request that this be completed one-month after the conference
- *Aggregate Net/Expense ratio:* This is relevant for financial sponsored events. It is recommended we meet the 20% IEEE benchmark and we will work closely with conference organizers on this.

- *Average time to publish:* The IEEE benchmark is 30 days (one month). Hence our request for conference organizers to submit the proceedings to IEEE conference services within one month.
- *PDFs/Conference:* This relates to the number of papers submitted in the proceedings.
- *Downloads / PDF:* This relates to the number of downloads each conference paper has received on IEEE Xplore®.

Our conference portfolio and its conference publications are in a strong position within IEEE. The number of EPS conference papers downloaded on IEEE Xplore® is above the IEEE average. Working with you as conference organizers, we aim to strengthen the health of our conference portfolio to meet all the IEEE benchmarks.

Promoting EPS at the conference

Our conferences provide a unique opportunity to promote our society to both members and non-members. We would like to work with you in identifying how best to do this. Items that we can provide include:

- Number of paper downloads from IEEE Xplore® for previous conference proceedings.
- EPS promotional material
- Society Membership promotions for conference attendees

Summary

We hope that the information provided in this handbook and the links provided in the conference timelines, and the links on the EPS conference resources webpage, will help you run a very successful conference. As detailed above, EPS has a number of technical committees and local chapters that can support your conference. We encourage you to investigate these where appropriate.

Our conference portfolio is very important to the society and its members. We very much appreciate your interest in organizing an EPS conference and we look forward to working with you in making this a success.

Denise Manning – EPS Executive Director

Sam Karikalan – EPS VP Conferences

Appendix A

Financially Co-Sponsored Conference Timeline (Pre-Conference)

IEEE Electronics Packaging Society

Conference Timeline for Financially Sponsored Conferences

PRE - CONFERENCE

START	
TASK	CONTACT
Determine, apply and obtain sponsorship from all applicable IEEE and/or non-IEEE organizational units	Contact EPS Executive Office
18 Months	
TASK	CONTACT
Register your conference with IEEE	IEEE Conference Application
Submit preliminary budget to EPS Office prior to MOU approval	
Submit MOU/FaMOU (if applicable)	Click for more information on MoU/FaMOU
Complete POBC/COI Forms	IEEE POBC/COI Forms
Submit IEEE Conference Publication Form	IEEE Conference Publication Form
Establish IEEE Concentration Bank Account (if applicable)	Contact Conference Finance
Submit Budget to IEEE for review and approval	Budget Template
Issue Request for Proposal (RFP) and contract Management Company	IEEE Templates: Contract Legal Documents
Site reconfirmation and finalizing contract for submission to IEEE	
Finalize Contracts and submit to IEEE	IEEE Conference Contracts Team
18-12 Months	
TASK	CONTACT
Begin outreach to educational institutions, corporations, government and industry support and patronage	
Apply for grants for conference support	
Develop technical program, establish paper submission process and deadlines.	Developing a Technical Program
Submission process should include CrossCheck	CrossCheck
Set-up online paper management system	
Draft a Call for Papers (CFP)	Promotional Event/Flyer Templates
Submit Budget to IEEE	Submit Financial Report
12-9 Months	
TASK	CONTACT
Register for PDF Xpress (optional)	Contact IEEE eXpress
Issue Call for Papers (CFP) and exhibit prospectus at current year's conference, if applicable	
9-6 Months	
TASK	CONTACT
Promote Call for Papers	
Review and reconfirm hotel meeting space and room block	
6 Months	
TASK	CONTACT
Create registration form and ensure registration service Payment Card Industry (PCI) compliant.	
Set registration fees	
6-4 Months	
TASK	CONTACT
Launch online registration	
Complete paper review process. Finalize technical program. Notify authors.	
Create and publish advance program	
4 Months - START	
TASK	CONTACT
Submit Pre-Conference forecast ((incl. updates to projected attendance based on paper acceptance number, confirmed financial contribution, expenses, etc.)	Submit Forecast to IEEE
Issue travel grants, if applicable	
Monitor Budget	

Financially Co-Sponsored Conference Timeline (Post-Conference)

IEEE Electronics Packaging Society

Conference Timeline for Financially Sponsored Conferences

POST - CONFERENCE

Immediately After Conference

Issue post event survey, if applicable

1 Month Post

TASK

Repay IEEE advance loans within 30 days from the end date of the conference, if applicable
Submit Conference Proceedings/Content (Xplore CD and other media types) per LoA

CONTACT

[Contact IEEE Conference Services](#)

3 - 6 Months Post

Distribute surplus

Close conference bank account and submit proof of account closure

Prepare and submit all audit material, if needed

Submit final financial report with Certificate of Accuracy

[IEEE Policy 10.1.10](#)

[Submit Final Financial Report to IEEE](#)

Appendix B

Technical Co-Sponsored Conference Timeline (Pre-Conference)

IEEE Electronics Packaging Society

Conference Timeline for Technically Sponsored Conferences

PRE - CONFERENCE

START	
TASK	CONTACT
Determine, apply and obtain sponsorship from all applicable IEEE and/or non-IEEE organizational units	Contact EPS Executive Office
12-9 Months	
TASK	CONTACT
Register your conference with IEEE	IEEE Conference Application
Submit MOU/FaMOU (if applicable)	Click for more information on MoU/FaMoU
Submit IEEE Conference Publication Form - if applicable	IEEE Conference Publication Form
9-6 Months	
TASK	CONTACT
Begin outreach to educational institutions, corporations, government and industry support and patronage	
Develop technical program, establish paper submission process and deadlines.	Developing a Technical Program
Submission process should include CrossCheck	CrossCheck
Set-up online paper management system	
6 Months	
TASK	CONTACT
Promote Call for Papers	
Review and reconfirm hotel meeting space and room block	
Set registration fees	
6-4 Months	
TASK	CONTACT
Launch online registration	
Complete paper review process. Finalize technical program. Notify authors.	
Create and publish advance program	

Technical Co-Sponsored Conference Timeline (Post-Conference)

IEEE Electronics Packaging Society

Conference Timeline for Technically Sponsored Conferences

POST - CONFERENCE

1 Month Post

TASK	CONTACT
Submit Conference Proceedings/Content (Xplore CD and other media types) per LoA	Contact IEEE Conference Services