

OCEANS CONFERENCE OPERATIONAL POLICY MANUAL

HOW TO PROPOSE, HOST AND CONDUCT AN OCEANS CONFERENCE

2010 release



IEEE



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Chapter I - Introduction

Section 1 - Introduction

This document provides guidelines for the planning and conducting of OCEANS Conferences. The OCEANS Conferences are cosponsored by the Marine Technology Society (MTS) and the Oceanic Engineering Society (OES) of the Institute of Electrical and Electronic Engineers (IEEE).

The official name of the conference is:

- OCEANS'XX MTS/IEEE City
 - when the conference is co-sponsored by MTS and IEEE/OES
- OCEANS'XX IEEE City
 - when the conference is sponsored by IEEE/OES only

OCEANS should always appear in uppercase letters and XX is the year.

The Conference comprises both a scientific conference (oral and poster presentations) and a state of the art exhibition in the field of Engineering and Marine Technology. It is a major forum for scientists, engineers and end-users throughout the world to present the latest research results, ideas, developments and applications in all areas of oceanic science and engineering. Each Conference has a theme and provides a review of recent technical advances in oceanic engineering, science and technology.

Each conference consists of technical paper sessions and exhibits, complemented by tutorials, a student poster competition and/or poster sessions, panel discussions, awards ceremonies, tours, receptions, and other professional and social activities. Conference proceedings are provided on a CD/DVD, made available at the conference. All papers that are presented at the conference are archived in the IEEE Xplore database.

This Manual provides the conference planning schedule, defines and describes the roles of the Reconnaissance Committee (RECON), the Joint Ocean Administrative Board (JOAB), the conference Liaison and the Local Organizing Committee (LOC), and discusses important aspects of conference planning, including exhibits, web tools, and technical program.

RECON investigates potential sites for future conferences and is the first committee in contact with a future LOC. The two committees cooperate in the transition of the oversight from RECON to JOAB. The Conference Liaison(s) work closely with the LOC to provide a chain of command for support and interaction with the Society(s) and JOAB. JOAB provides expert guidance to the LOC and the Liaisons to ensure that the LOC is planning and running the conference according to established policies and procedures.

Finally, this document provides a detailed description of the different sub-committees that the LOC should set up for planning and running the conference: Technical Program, Exhibit, Finance, Promotion and Local Arrangements, along with the web based tools developed by the Societies for the conference LOC.

Section 2 - OCEANS Conference Characteristics

- The following considerations are general recommendations for a typical conference time period:
 - In the spring, preferably Mid-May to end of June for the non North-American venues (generally sponsored by IEEE only, although MTS is considering future co-sponsorship).
 - In the fall, preferably end of September to early November for North American venues (MTS and IEEE co-sponsored).
 - Particular attention must be given to avoiding conflicts with related subject events.
- Duration - Normally four days (from Monday to Thursday) with Monday devoted to Tutorials and exhibit set-up and Tuesday - Thursday devoted to technical sessions, exhibits and other conference activities.
- Attendees - typically between 1000 – 2000 attendees
- Delegates (paying a registration fee) – typically 600-900 delegates
- Exhibit – typically 125 - 200 exhibitors
- Technical papers - between 300 - 500
- Technical breakouts - 8 - 12 parallel sessions in 10 time slots. No technical sessions are held during the opening plenary session.
- One Plenary Session - Tuesday morning
- Society Award Luncheons - 400 attendees for each. Usually award lunches are held separately for each society, Tuesday and Wednesday - alternating each year.
- Social events
 - Gala evening function, typically Wednesday
 - A welcoming reception, "Ice Breaker" at no cost for attendees - on Monday evening,
 - A reception held in the exhibits area, "Exhibitor's Reception", to support the Exhibitors on Tuesday evening.
 - Informal box lunch or buffet in the exhibits area on Thursday (suggested).
- Societies' Administrative meetings - approximately 10, scheduled throughout the conference, 5 - 50 attendees depending on the meeting
- Sleeping rooms - escalating from 50 on the initial night to 450 on the peak night; total sleeping nights approximately 1800
- Finances
 - Conference budget: \$500,000 to \$2,000,000
 - The planning budget income must at least equal and should, if possible, exceed the projected expenses, including the Societies' expenses, which will be billed to the conference.

Section 3 - Time-Line

RECON, a joint MTS/IEEE committee, seeks and helps to develop candidate venues for OCEANS Conferences. An MTS and/or IEEE/OES group in a geographic area who desire to host a conference should indicate their interest to RECON by email (recon@oceansconference.org) at least seven years before the event for a non North American site and at least six years before the event for a North American site.

Chapter II describes how to prepare a bid for the conference. The goal is to seek a conference venue bid for fall of a given year, alternating between North-American east (even years) and west (odd years) coasts and a conference venue bid for spring of a given year, alternating between Europe (odd years) and Asia-Pacific (even years). If there are other interested, capable venues, they may be scheduled into different years to avoid or minimize competition for the same year. The conference venues should be scheduled to provide good geographic distribution, especially by taking into account the requests from the USA Gulf Coast or Pacific regions and Canada.

Chapter III describes the venue selection and approval process, including descriptions of the roles of RECON, JOAB, the OCEANS Conference Liaison, the LOC, and the Technical Program Committee (TPC).

The development phase of the conference is summarized in Table 1 - Development Phase of Conference Planning and is described in Chapter II - .

Table 1 - Development Phase of Conference Planning		
Time (years)	Action	Responsible
- 7 years (non North American)	Indicate Interest to RECON via email.	Local MTS and/or OES group desiring to organize a Conference
- 6 years (North American)	Submit Letter of Intent and Information Form to host future OCEANS Conference	
- 5 to - 6 years	Evaluation of Letters of Intent	RECON, JOAB and Societies
	Site Visits (optional)	RECON
~ 5	Preliminary Approval of one or several potential LOCs	RECON, with input from JOAB and Societies
- 4 to - 5	Preparation of Preliminary Conference Plan	Potential LOC with guidance from RECON
	Review of Conference Plan	RECON and JOAB
	Review of Budget	Representatives of MTS and OES
	Formation of LOC core - General Chair, Finance Chair, Technical Program Chair, Exhibits Chair	Potential LOC
~ 4 years	Presentation of Final Conference Plan to RECON and JOAB	Potential LOC
	Presentation of Final Conference Plan to representatives of MTS and OES	Potential LOC
	Final selection and approval of LOC	MTS, OES, RECON and JOAB
~ 3.5 years	Issuance of Memorandum of Agreement and Letter of Appointment to LOC	MTS and OES
	Signing of Memorandum of Agreement and Letter of Appointment	Conference General Chair of LOC
	Selection of Liaison(s)	JOAB and Societies with input from RECON
- 4 to - 2 years	Formation of full LOC	Selected local group

The operational phase of the conference is summarized in Table 2- Operational Phase of Conference Planning. It is important in scheduling these milestones to avoid conflicts with the milestones of other OCEANS Conferences.

Table 2- Operational Phase of Conference Planning		
Time (months)	Action	Responsible
36 - 24	Begin advertising Conference, Website setup, Publish flyer	LOC
	Make use of complimentary booth at 2 or more previous OCEANS Conferences	LOC
24 - 12	Announcement flyer including Call for Papers, Student Posters, Tutorials and exhibitors posted on conference website	TPC
	Begin signing up exhibitors	
- 9	Continue Exhibitors chase	LOC
- 6	On-line abstract submission open	TPC
- 4.5 to -4	Abstracts deadline	TPC
		TPC
- 4 to 3	Review and accept or reject abstracts	TPC / JOAB
-3	Acceptance notification to authors	TPC
	Post list of accepted authors/titles/topics on line	TPC / JOAB
	Preliminary session grouping	
- 2	Full paper submission deadline	TPC
	Final session grouping	TPC
- 2 to - 1	Technical Program on-line	TPC
	Update Technical Program	TPC
- 1 to 0	Final Program on-line	TPC
	Publish CD/DVD Proceedings	TPC
0	Conference	LOC
Last day	Evaluation of Conference (Hot wash)	JOAB
+ 6	Post Conference Report	LOC, Reviewed by JOAB
	Books closure; financial report	LOC, Reviewed by Societies

Section 4 - Conference Schedule Overview

Table 3 - Typical Program Schedule Overview		
Sunday		Societies' Board Meetings, etc.
Monday	all day	Registration opens
		Tutorials
		Societies' Board Meetings, etc.
	evening	Possible Panel session
		Welcome Reception "Icebreaker"
Tuesday	early morning	authors' breakfast
	morning	Plenary Opening Session
		Keynote speakers
		Exhibit Hall Opening and walk through
	noon	Society Awards Luncheon
	afternoon	Technical Sessions
		Other Societies' committee meetings
	evening	Possible Panel session

		Exhibit Hall Reception
Wednesday	early morning	authors' breakfast
	morning	Technical Sessions
		Other Societies' committee meetings
	noon	Society Awards Luncheon
	afternoon	Technical Sessions
		Other Societies' committee meetings
	evening	Gala Social Function
Thursday	early morning	authors' breakfast
	morning	Technical Sessions
		Other Societies' committee meetings
	noon	Luncheon
	afternoon	Technical Sessions
		Other Societies' committee meetings
		Conference Evaluation "Hot Wash" meeting with JOAB
		JOAB Wrap-up meeting
Friday		site visits (optional)

Section 5 - Terminology and Acronyms

The following is a list of terms and acronyms used in this document.

RECON - Reconnaissance Committee (cf. p.13): A joint Societies committee that identifies and evaluates venues for future OCEANS Conferences.

JOAB - Joint OCEANS Administrative Board (cf. p.14): A joint Societies committee that develops Conference guidelines, advises and oversees the Local Organizing Committees on planning, organizing and conducting OCEANS Conferences.

Web Tools – (cf. p.45) A suite of web based tools developed by the Societies to run many aspects of an OCEANS conference. Full use of the Web Tools by the LOC is mandatory.

LOC - Local Organizing Committee (cf. p.15): A committee of volunteers, primarily local to the venue, formed to plan, organize and conduct a particular OCEANS Conference in a particular venue at a particular time.

Liaison - OCEANS Conference Liaison(s) (cf. p.15): One or two representatives from the Societies who are members of the LOC and are temporary members of JOAB and who serve as liaison(s) between the LOC, JOAB, and the Societies.

TPC - Technical Program Committee: A committee with LOC and Society membership that has primary responsibility for the development of the Conference Technical Program.

PCO - Professional Conference Organizer: A conference management firm under contract to the Societies to provide development and organizational services for running a conference.

Societies - The Marine Technology Society (MTS) and the Ocean Engineering Society (OES) of IEEE, who jointly or solely sponsor the OCEANS Conferences, and more particularly the boards and elected and executive officers of these societies.

Chapter II - LETTER OF INTENT AND CONFERENCE PLAN

This chapter explains the procedures to be followed by a potential Local Organizing Committee (LOC) when bidding for an OCEANS Conference. (See Chapter I - Section 5 - for full list of abbreviations.). The conference approval process is detailed in Chapter I. Initially, an email indicating interest in hosting an OCEANS conference should be submitted to the Reconnaissance (RECON) Committee (recon@oceansconference.org). Upon approval, a Letter of Intent, accompanied by a concise Information Form, will be submitted to RECON. Based on this, RECON will give preliminary approval to one or several LOCs.

The preliminary approved LOC(s) shall prepare a Preliminary Conference Plan, with guidance from RECON. In most cases, RECON will visit the proposed site(s) and interview the LOC(s). Then, this preliminary approved LOC(s) will present the Preliminary Conference Plan to the RECON and JOAB committees. The RECON/JOAB committees will then give provisional approval to the leading bid.

After receiving provisional approval, the chosen LOC will present the Final Conference Plan to the Boards of the Societies. The Boards, together with RECON and JOAB, will then give final approval. The final approval of the LOC and the site for the event will be made approximately 4 years before the event.

IEEE requires a set of mandatory documents to be sent. Appendix V - provides an up-to-date list.

This chapter also provides information on the support provided to the potential LOC by the Societies.

Section 1 - Letter of Intent and Information Form

Following acceptance of the LOC's email to RECON (recon@oceansconference.org) expressing interest, the potential LOC will submit a Letter of Intent and Information Form to host the OCEANS conference to RECON acting on behalf of the societies. This letter should be submitted at least 6-7 years before the event for non North American conferences and at least 5-6 years before the event for North American conferences.

The concise Information Form accompanying the Letter of Intent will provide basic information on the proposed event, site, facilities and LOC. An outline for this Information Form is provided in Table 4 - RECON Information Form to Accompany Letter of Intent. The Information Form should not exceed three pages plus the sketch of the proposed facility arrangements. Other information, such as brochures, is not required at this stage and will not be considered in the preliminary review process.

RECON will assess the capabilities of the proposed LOC core members. The LOC core members are: Conference General Chair, Conference Finance Chair, Technical Program Chair or Co-Chairs and the Exhibits Chair. In most cases, representatives of RECON will visit the proposed site to assess the suitability of the proposed facilities.

RECON, JOAB, and the Boards of the Societies will review all received Letters of Intent and Information Forms approximately 6 years before the event.

With consideration of comments from JOAB and the Boards of the Societies, RECON will then select the LOC(s) of one or several potential sites for further consideration and invite them to prepare a Preliminary Conference Plan. This selection will be made approximately 6 years before the event.

Section 2 - Conference Plan

Upon receiving an invitation from RECON, the potential LOC(s) shall develop a detailed Preliminary Conference Plan, which must include a budget. RECON will provide guidance in the preparation of this plan.

The Preliminary Conference Plan shall include, as a minimum, the items listed in Table 5. These items will be reviewed by RECON and JOAB. The potential LOC(s) will make a presentation of the Preliminary Conference Plan at a joint meeting of the RECON/JOAB committees. This presentation will be made at an OCEANS Conference approximately 5 years before the event. The Preliminary Conference Plan will be reviewed by and must be approved by OES or, for joint conferences, by OES and MTS. The budget will be reviewed and must be approved by representatives of OES or, for joint conferences, by representatives of both societies.

RECON and JOAB will then give provisional approval to the accepted bid.

After receiving provisional approval by RECON and JOAB, the provisionally approved LOC will then seek final approval by presenting the Final Conference Plan to representatives of OES or, for joint conferences, to representatives of both societies. This presentation will be made at an OCEANS conference approximately 4 years before the event. Based on the presentation, RECON, JOAB, and the Boards of the Societies will determine final site approval.

Once the conference plan and budget are approved by the Societies, the conference general chair designated by the LOC will receive a Letter of Appointment from the Societies. The conference general chair (and co-chairs) must then sign a Memorandum of Agreement (MOA). All LOC members with advanced oversight will also have to sign a conflict of interest form.

Section 3 - Local Organization

In as much detail as possible, local personnel who are likely to hold key chair and committee positions should be identified, together with their relevant experiences and affiliations. The Conference General Chair and Local Organizing Committee are the keys to a successful Conference.

The selected local group shall begin to form an LOC. A typical LOC structure is shown in Chart 1. The organization and membership of the Committee may vary according to the wishes of the selected local group. The LOC core, comprised of the General Chair, the Finance Chair, the Technical Program Chair, and the Exhibits Chair, must be identified in the proposal. The membership of the Committee shall be reasonably proportioned between the Societies; however, the selection process should place primary emphasis on the qualifications rather than the societal membership of candidates.

Core members of the LOC are required to be members of at least one of the Societies. They will be required to sign a conflict of interest form.

The responsibilities of LOC members vary both in magnitude and timing, i.e., technical papers will peak on the abstract due date so considerable time will be required at that time by the technical program chair. All members of the LOC, especially the core members, must be aware of the time commitment to conduct an OCEANS conference. They must have the ability to respond quickly to questions, etc., from those who help with the conference, and also to those participating in the conference.

Once the Final Conference Plan has been approved by the Societies, the LOC shall organize and conduct the conference in accordance with the submitted plan and subject to the terms of the Memorandum of Agreement ((cf. Appendix VI - MOA) with the Societies. The MOA shall be signed by the Conference General Chair(s) and the Presidents of the Societies.

Section 4 - Sponsors and Patrons

The Marine Technology Society and the Oceanic Engineering Society of the Institute of Electrical and Electronic Engineers are the equal co-sponsors of the conference. Financial responsibility for the conference rests with the sponsors.

The Societies will provide assistance to the Local Organizing Committee as outlined below:

- Legal assistance of a consulting nature.
- Liability Insurance
- JOAB assistance, advice, and oversight.
- Editorial promotion and advertisements of the Conference in Society publications.
- Efforts expended by officers and members to attract key personalities.
- General support under the control and direction of Society officers.
- Members for the Technical Program and Exhibits Committees and for other committees upon request.
- Assistance from the Societies' Technology and Professional Committees in the development and implementation of the Technical Program.
- Materials and data from previous Conferences.
- Legal fees in support of litigation
- Mailing and membership lists
- Web tools for website construction, technical program management, exhibit, and conference registration
- Web tools training and operational assistance

The success of the Conference is dependent upon harmonious working relationships with the local Society chapters and sections. They have a responsibility to support the Conference with volunteers, advertising, and to assist in bringing the resources of the host community to provide assistance (Chamber of Commerce, etc.). They may, through agreements with the Societies, share in the revenues of the Conference based upon approved distribution formulas specified independently by each Society.

For OCEANS conferences there are only two sponsors--MTS and IEEE/OES. Other sponsors may be considered, but an MOU (Memorandum of Understanding) is required to document and formalize the agreement.

Patrons are those who provide the conference grants or direct support, such as Universities, Government, private companies etc.

A final category is where other societies provide support for the conference by making their members aware of the conference and soliciting participation. This group is called "Participating Organizations" and/or "Technical co-sponsors". They have no financial interest and provide technical support and publicity, for which the conference provides their members with conference member fee rates. This is highly desirable from a standpoint of participation and a broad base for publicity of the Conference. Typically an offer can be made to provide the President or executive secretary free registration and a copy of the Proceedings for the Society libraries and other such amenities as are deemed appropriate by the Conference Committee and with the approval of JOAB.

The Participating Organizations will advertise the Conference in their respective journals at no cost to the Conference. An exhibit booth may be offered to a Technical sponsor in exchange for their advertisement of the Conference. In some instances related societies might consider back-to-back conferences with the Conference, with provisions for joint registration.

In any case, the logos display must be prioritized: SPONSOR logos go first and are labeled SPONSOR. Next comes PATRON logos and they are labeled PATRON. Last TECHNICAL

SPONSORS which are so labeled.

MTS and OES have contracted with a Professional Conference Organizer (PCO) to provide support to the local organizing committee. The LOC is required to use the PCO for contracting with hotels. Other services may be selected, but must not supplant the web services described below. Under no circumstances are LOC members to make any financial commitment to a hotel or conference venue facility. Appendix IV - PCO outlines the list of contracted and available services from the management service. The management service is under contract to the Societies and works for the LOC by fulfilling tasks and functions selected by the LOC subject to oversight and approval by the Societies.

MTS and OES have also contracted with a web services provider to develop and support a suite of web tools. The LOC is required to use these tools, which support construction of the conference website, management of the technical program, and conference registration. Chapter VI - Web Tools outlines the capabilities of the tool suite. The Societies shall provide members of the LOC with training in the use of the web tools no less than two years before the conference. The web services provider is under contract to the Societies and works for the LOC subject to oversight and approval by the Societies. The desired PCO support must be accounted for in the conference budget.

Table 4 - RECON Information Form to Accompany Letter of Intent

Bid for OCEANS Conference for what year, dates?

Is it still effective for subsequent years?

Location and significance of location for marine sciences and industries.

Theme.

Conference and Lodging Facilities:

- Sketch of arrangement showing relationships of:
 - registration, exhibits, meeting rooms, plenary, banquet and event rooms
- Size of exhibit area
- Number and typical capacity of meeting rooms.
- Capacities of plenary session, banquet and event rooms.
- Number of “regular” hotel rooms, typical cost and distance from Conference site.
- Number of “economy” hotel rooms, typical cost and distance from Conference site.
- Number of “government” hotel rooms, typical cost and distance from Conference site.

Nearest major airport, travel time and travel means from that airport

Marine facilities and attractions that might be visited or used.

When must hotel and conference facilities be committed/signed to assure date.

Potential LOC team and their “experience”, particularly the LOC Core - Conference General Chair, Conference Finance Chair, Technical Program Chair or Co-Chairs, Exhibits Chair.

Probable / Potential “Tie-Ins” of other conferences or events with the OCEANS Conference.

Probable / Potential Patrons.

Plans to establish a local OES or MTS section if one does not already exist.

Table 5 - Essential Features of Conference Plan

Conference location and hotel

Conference dates (including related events)

LOC Core – (see requirements in Section 2-3)

- Conference General Chair,
- Conference Finance Chair,
- Technical Program Chair or Co-Chairs,
- Exhibits Chair. (see requirements in Section 2-3)

Conference Budget

Conference Theme

Participating organizations

Financial grants to the Conference

Academic, Industrial, and Governmental support for the Conference

Chapter III - Location selection and approval

This chapter provides a detailed description of both joint committees (RECON and JOAB) created for helping the conference. RECON helps the possible local venue to formulate a proposal including all aspects of the conference. JOAB is an administrative and oversight committee with a Liaison acting as a relay in the LOC.

Section 1 - Reconnaissance Committee (RECON)

A charter for the RECON operative mode has been approved by both societies. This charter establishes the membership and functions of the Reconnaissance (RECON) committee in charge of identifying and evaluating prospective sites suitable for holding OCEANS Conferences.

The RECON Committee members are appointed by their respective OES and MTS President. They must have had previous experience with conducting an OCEANS conference. A balanced MTS-OES representation is needed for jointly sponsored conferences, with additional OES representatives for conferences sponsored solely by OES. The societies have assigned sufficient authority to RECON members to conduct their tasks.

Venue quest:

- Seek candidate venues: Initially seek single, non-competitive venue proposals for a given year and season. North American venues will generally alternate between the east (even years) and west (odd years) coasts in the September to November time frame. Non North American venues will generally alternate between Asia-Pacific (even years) and Europe (odd years) in the May to June time frame. If there are multiple interested, capable venues for a given year and season, arrange to schedule them into different years to avoid or minimize competing proposals.
- Help the representatives of the potential venue to generate a preliminary proposal (2-3 pages) that describes their objectives and information on the conference that answers the questions pertaining to “What, When, Where, How & Who”, in accord with these MTS/OES Conference Guidelines.

Venue guidance in proposal writing:

- Conduct venue site visits
- Assess transportation and accessibility to the site
- Assess adequacy of the facilities
- Identify potential sponsors and financial support
- Assess leadership offered: Honorary Chairs and Local Organizing Committee
- Identify venue attractions
- Present information on MTS/OES Conference Guidelines
- Discuss the MTS/OES process in getting approvals and the administrative role of JOAB in assisting in conference management

Proposal and Reporting Guidance:

- Request a preliminary proposal using this manual as a reference at the following URL http://www.oceanicengineering.org/OCEANS_Conference_Manual.cfm
- Request periodic reports to RECON prior to meetings of MTS, OES and JOAB.
- Present to RECON (with JOAB invited), then with RECON and JOAB approval, present to MTS Board & OES AdCom at the next conference.
- Work with JOAB and the LOC to register the conference with IEEE, obtained signed MOA's and other official documents, and submit required documentation to IEEE and MTS.

Section 2 - Joint OCEANS Administrative Board (JOAB)

The JOAB charter has also been approved by both societies.

This charter establishes the membership and function of the Joint OCEANS Administrative Board (JOAB), which provides oversight of the LOC for the Societies and coordinates and guides LOC activities related to the OCEANS Conference and Exhibition.

The JOAB committee members are appointed by their respective OES and MTS president. They are the JOAB Administrators. They must have had previous experience with conducting a conference. A balanced MTS-OES representation must be achieved. The Societies have assigned to the JOAB committee sufficient authority to carry out its role consistent with the Society recommendations and guidance.

The main tasks of JOAB are summarized below:

Venue selection:

- Review candidate Letter of Intent prepared with the help of RECON.
- Work with RECON and the selected local group to develop the formal proposal.
- Work with RECON to facilitate proposal presentation to, RECON, JOAB, then to the leadership of the Societies.
- Evaluate final documents in collaboration with RECON and make a recommendation to the leadership of the Societies.

Venue guidance and OCEANS conference administration:

- Introduce JOAB members to their respective counterparts on the LOC.
- JOAB representatives present their guidance to each LOC sub-committee chair.
- Advise the LOC in developing a conference theme that will be carried out in the Technical Program, Plenary Session, and Special Technical Sessions.
- Advise the LOC on the financial requirements for the conference.
- Advise the LOC in developing the conference budget, publicity, technical program, exhibits, and local arrangements.
- Interface the LOC with the web services provider and the PCO relative to conference operations.
- Report periodically to the Societies.

- Receive communications regularly from the LOC, particularly during the last year prior to the conference, to assure that milestones are met.
- Conduct a conference "hot wash" (lessons-learned meeting) at the conclusion of the conference.

Section 3 - OCEANS Conference Liaison

The Liaison serves as a link between the LOC, JOAB and the Societies to ensure experienced conference oversight and guidance. There may be a Liaison from each Society, or one Liaison may serve for both Societies. The Liaison should be experienced in all aspects of organizing and running an OCEANS Conference. The Liaison preferably is located near the venue and the LOC so that he or she can easily attend planning meetings.

The Liaison has three key roles:

- The Liaison is an *ex officio* member of JOAB.
- The Liaison is also an *ex officio* member of the LOC, representing the Societies and providing advice to the LOC to ensure the conference is proceeding in accordance with this manual.
- The Liaison serves as a single point of contact between the LOC, JOAB, and the Societies to answer any questions, to resolve any areas of concern, and to provide JOAB resources to the LOC.

Societies should pay for funding Liaison travel and support. Candidates for the Liaison position are selected by JOAB and the Societies with input from RECON. The individual(s) selected will be appointed by the presidents of the Societies, preferably by the time the Final Conference Proposal is approved.

Section 4 - Local Organizing Committee (LOC)

The structure of the Local Organizing Committee follows the different functions and tasks that must be accomplished in running a conference. Chart 1 below outlines the internal structure of the LOC. The functions of each sub-committee and their relationships to the Societies are detailed in Chart 2.

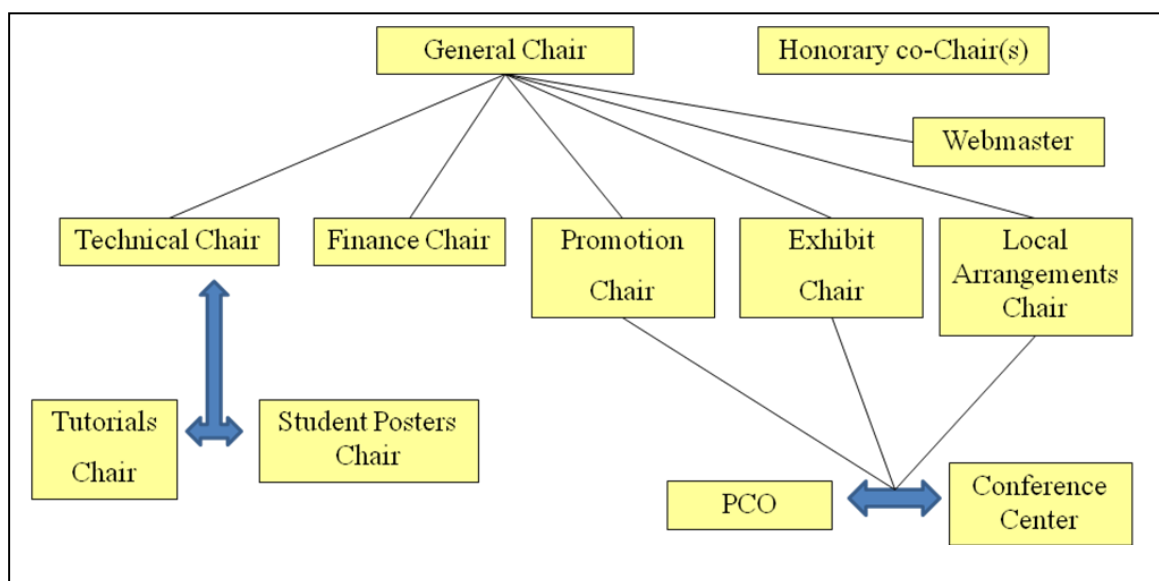


Chart 1– General sketch of the Local Organizing Committee.

The LOC should disband about six months after the conference when the financial audit is completed and the Conference closed. It would not be appropriate to provide funding to the LOC at the end of the Conference. That decision should be left for the two Societies to provide funding to their local Chapters depending on their participation and their performance. Both MTS and OES have provided funding from the Conferences to support their local Chapters.

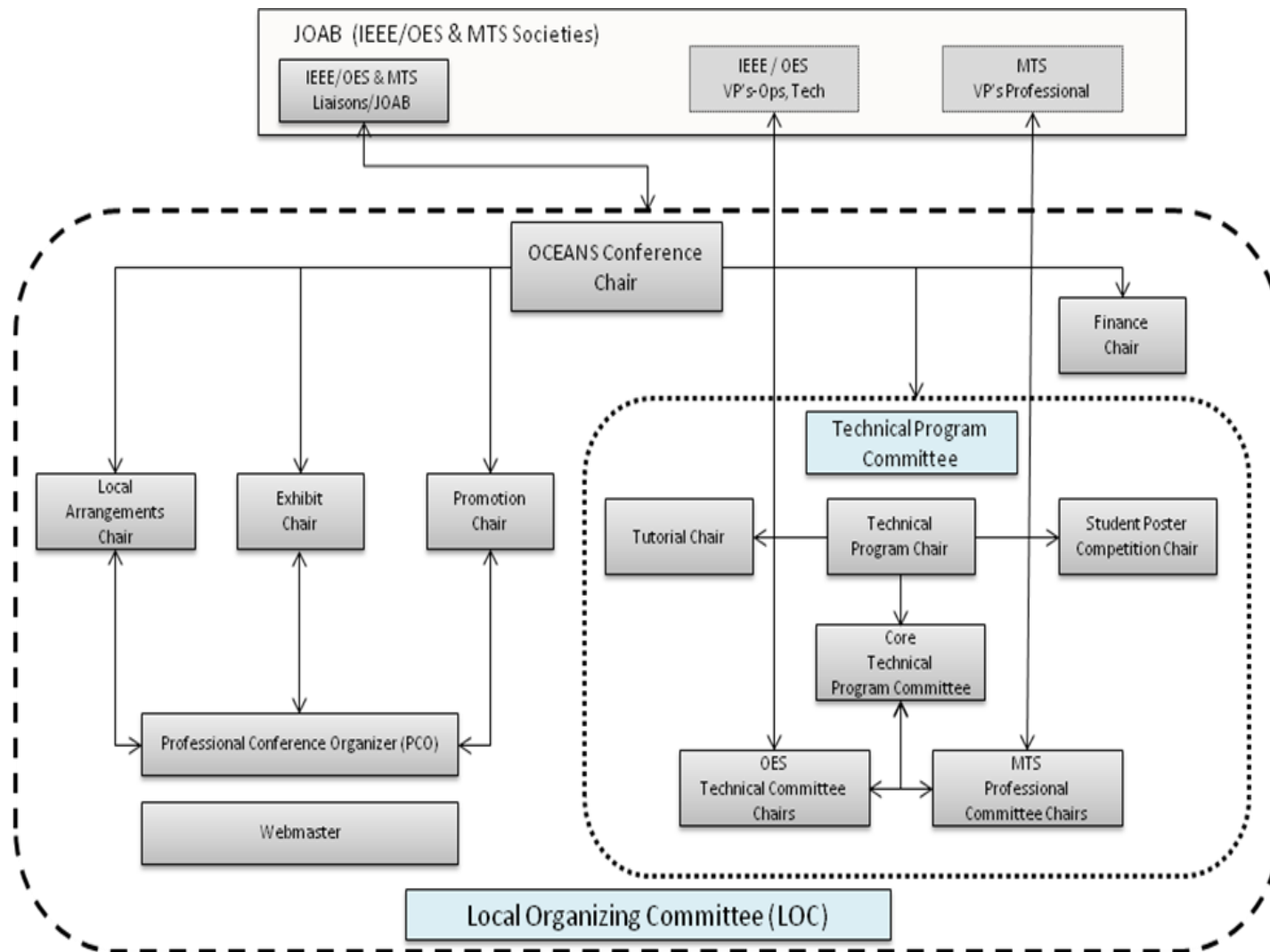


Chart 2 – Detailed Local Organizing Committee (LOC) Standard Organization Structure
 Incorporating OES Technical Committee Chairs and MTS Professional Committee Chairs as *ex officio* members of the Conference Technical Program Committee

Chapter IV - TECHNICAL PROGRAM

This chapter provides guidelines for planning and conducting the technical program at Oceans Conferences. Substantial effort should be made to provide the highest quality technical program possible.

The technical program consists of plenary sessions, technical sessions, student poster sessions, and tutorials. The program format should be consistent from year-to-year.

The technical program is developed and arranged by a Technical Program Committee (TPC).

The TPC might have a single chair or might have co-chairs, one from each Society if possible. The chair or at least one of the co-chairs must have prior experience in planning, conducting and participating in technical programs at previous conferences, for example as members of a TPC or an LOC, as abstract reviewers, as track or session chairs, or as authors. The chair or co-chairs should preferably be a resident of the site of the conference, so they can serve on the LOC, but this is not a requirement. If the chair or both of the co-chairs are not resident, then a vice chair should be appointed to represent the chair(s) at LOC meetings.

The TPC should consist of representatives from the LOC, the Societies' Committees, and JOAB (see Chapter 2). When used in this chapter, the term Societies' Committees refers to MTS Professional Committees and OES Technology Committees.

The chairs of the Societies' Committees are *ex officio* members of the TPC. They are expected to solicit abstracts. They are expected to serve as reviewers and/or appoint reviewers, and serve as or nominate session chairs. When called upon, they are expected to advise on assignment of papers to sessions and on the scheduling of sessions.

Tutorial and Student Poster Chairs are directly under the TPC Chair, especially in arranging program schedules and publishing the Conference CD/DVD. Plenary Sessions are planned directly by the LOC.

Section 1 - Technical Sessions Overview

The TPC is responsible for soliciting abstracts, selecting and guiding abstract reviewers, making final selection of papers, notifying selected (and rejected) paper authors, arranging the technical session schedules, filling out sessions with accepted papers, preparing papers for publishing in the Conference CD/DVD and the IEEE Xplore data base, providing session chairs, and conducting the sessions. The Societies' Committees assist the TPC by soliciting papers, reviewing abstracts, and providing session chairs.

Table 6- Technical Program Planning Schedule gives an outline schedule of the process for planning and conducting the technical sessions.

Table 6- Technical Program Planning Schedule		
time	action	coordination
- 13 months	Prepare web site with advanced call for papers, giving general information for potential authors, and stating when web site will be open for paper proposals.	with conference web master with papers web master

Table 6- Technical Program Planning Schedule		
	distribute printed advanced call for papers announcement as part of Conference Brochure at previous conferences	
- 8 months	review topics and subtopics list for currency and completeness, possibly eliminating subtopics that have gotten little or no response in past and adding new categories corresponding to emerging fields and to new committees of the Societies	with JOAB representatives with Societies' Technology Committee and Professional Committee chairs
	solicit additional "local" or "topical" categories	with LOC
	add these categories to web page list	with papers web master
	review adequacy of technical session rooms at meeting facility	with LOC
- 6 months	open web page for acceptance of paper proposals	with papers web master
	solicit paper proposals directly, through Societies Committee chairs, and through Society newsletters and other publications	through JOAB representatives with Societies' Committee chairs
	place call for papers notice on conference web page	with conference web master
- 5 months	follow up on solicitation of paper proposals	through JOAB representatives
	solicit reviewers for paper proposals directly and through Society committee chairs	with Societies' Committee chairs
- 4 months	close acceptance of paper proposals	
	assign paper proposal reviewers, based on technical area, send emails notifying reviewers	with Societies' Committee chairs
- 3.5 months	complete review of paper proposals, follow up on late reviewers, fill in with substitute reviewers	
	establish reviewer rating cutoff and send acceptance and reject emails	
- 3 months	build technical program session grid	
	publish preliminary technical program on conference web site	
	remind authors of deadline for papers upload and paper fee.	with conference registration staff
- 2 months	solicit session chairs directly and through Society committee chairs, send emails to session chairs	with Societies' Committee chairs
	deadline for transmittal of papers for delegate CD	with papers web master
- 1.5 months to - 1 month	publish final technical program on conference web site and submit final program for printing	with LOC

Table 6- Technical Program Planning Schedule		
-3 days	prepare delegate bags with program, CD, tickets, badges, and flyers	with conference registration staff
conference	make, include with program in delegate bags, and post errata sheets for late changes	with conference registration staff
+1.5 months	submit CD to IEEE Xplore with “no shows” removed	with JOAB representative and papers web master

A core list of technical topics, prepared by JOAB and the Societies’ committee chairs shall be followed in order to include all areas of interest to the committees and to maintain continuity from conference to conference. This core list is given in Appendix II - Topic and Sub-Topic list.

The LOC is encouraged to add other topics in order to give “local flavor”, pertaining to the Conference theme or to emphasizing some event or activity relevant to the site location.

The TPC shall use the Web Tools, guided by the OCEANS Webmaster and the Societies’ committees, to receive and review abstracts, notify accepted (and rejected) authors, plan the program schedule, receive the final papers, and prepare the technical program. The Web Tools are described in Chapter VI - Web Tool Modules.

Section 2 - Call for Papers

A Call for Papers (CFP) shall be included in the Conference announcement distributed at preceding conferences. It shall, as a minimum, indicate a website address that provides further information for potential authors. It shall indicate the anticipated dates for submitting paper proposals and uploading final papers.

Paper proposals and final papers are submitted on-line through each conference’s website. Appendix I - *Abstracts and Papers On-line* describes the process, from paper proposal submission, through review, to preparation of the Proceedings.

The complete CFP shall be posted on the Conference website at least six to eight months before the conference. It shall clearly provide the requirements and restrictions on paper proposals and final papers, including:

- Paper proposal clearly explains the intended paper and its technical significance.
 - Paper proposal should be two pages long (including figures, equations and references).
 - Paper proposal must be submitted online via the Oceans Conferences website, and uploaded in pdf format.
 - Papers must be original work.
 - Papers shall not be advertisements or overly commercial.
- Paper proposal due date.
- Web site address for uploading paper proposal, along with any special instructions.
- Any other restrictions, limitations, or requirements for papers.
- Final papers due date.
- Requirement that an author must pay a paper fee (giving right to a full registration

package) and present the paper at the conference. Failure to present the paper at the conference will exclude it from the Xplore database.

- Email, phone number and postal address for contact person.

The paper proposals and the final papers will be checked for plagiarism.

The CFP shall include or be posted on the same Web page as a Call for Student Posters as well as a Call for Tutorials.

The CFP shall be publicized as much as possible. The Societies' Committee chairs will distribute it to their members. The Societies will post it on their web sites and promote it in their newsletters and other publications. It shall be sent directly (by email or postal mail) to attendees at previous conferences and especially to authors from previous conferences.

The promotion committee at the LOC should issue Press Releases to all appropriate media.

Section 3 - Review and Selection of Papers

The paper proposal review process is conducted through the Oceans Conferences web site.

Reviewers are assigned a limited number of paper proposals in their particular fields of expertise and interest. At least three reviewers should be assigned to each paper proposal. Reviewers are provided with passwords for access to the site, which enables them to view and rate the assigned paper proposals. The paper proposals are rated on a scale of 1 to 4 (4 high) as follows:

- 1 – Abstract does not describe new original work nor does it describe an update on work in progress.
- 2 – Abstract could be considered for the conference. Accept only if there is a shortage of abstracts.
- 3 – Abstract is very good and well written. Abstract describes new work or a new solution or treatment of a problem. Accept with high priority in the ranking.
- 4 – Abstract is excellent in all regards and should be accepted with a guaranteed high priority spot in the technical program.

Final selection of papers for inclusion in the Conference is then made by the TPC or a subgroup of that committee, based on the reviewer ratings of the paper proposals. In cases of close groupings of ratings at or near the cut-off point, the opinions or ratings of additional reviewers may be sought.

In the selection process, preference may be given to papers:

- Which are consistent with the conference theme. Special endorsement of paper proposals by the LOC shall be followed when possible.
- Addressing specific subject areas of interest to the Societies' committees. Special endorsements of paper proposals by the respective Societies' Committee chairs shall be followed when possible.
- From specific authors, companies, or institutions that have presented high quality papers in recent past OCEANS conferences.

Finally, negative consideration may be given to authors who submitted a paper for a previous conference and then did not attend the conference to present the paper, unless there is a known, acceptable, reason for the non-attendance.

The number of papers selected for publication may depend on the number and quality of paper proposals received.

The number of papers might be limited by the number of available session time slots (normally 10 time slots distributed across the parallel sessions). Twenty minutes shall be allotted to each paper, including introduction, presentation, questions, and answers. Time should also be allotted at the beginning of each session for introductions and general announcements.

The number of time slots, and thus the number of papers, might also be limited by the availability of meeting rooms. If at all possible, a sufficient number of meeting rooms should be available to avoid having to limit the number of accepted papers.

Usually some of the accepted papers are never uploaded by the authors (this default rate may be as high as 20%). Thus it is common practice to select more papers than the anticipated program can accommodate.

The final selection of papers and notification of authors must be made early enough to give authors sufficient time to prepare and submit significant, high quality papers. This is especially important where government or company employees must receive approval to release the final paper.

Section 4 - Scheduling the Technical Program

It is the policy of the Societies that an author or co-author of a paper must attend the conference and actually present the paper in one of the Technical Sessions. To assure compliance with this policy, a Paper Registration must be paid by one of the co-authors at the time the paper is uploaded. The upload is blocked by the Web Tools until the Paper Registration is completed. The Paper Registration includes full access to the conference, identical to a Full Registration, for that author. The upload part of the Website must clearly state this policy and caution the authors that they need to comply with the requirement or their paper will not be included in the Technical Program. This has the additional consequences that there will be no oral presentation of the work at the conference.

The schedule for the technical program should be prepared as soon as possible after abstracts have been reviewed and accepted so that it can be publicized on the Conference website. This Advance Program is available on-line as a feature of the Web Tools and shall not be distributed as hard copy. The TPC prepares the Advance Program grid using the Web Tools based on the full set of accepted abstracts. The grid will later be compressed based on the papers that are actually delivered by the accepted authors. The TPC should anticipate and plan for a 20% attrition rate.

Many people decide to attend (or not attend) the conference based on the specific papers that will be presented and they need time to plan their schedules, obtain approval from companies, institutions and agencies, and make travel arrangements. The Advance Program thus has significant practical importance when it comes to the success of the conference, so timely completion and advertising of the Advance Program grid should be given a high priority.

The technical program generally consists of concurrent sessions on Tuesday afternoon, Wednesday and Thursday. Each technical session focuses on a particular subject or area of technology. The selected papers should be sorted into technical areas and then grouped into coherent technical sessions. Guidance of the respective Societies' Committee chairs should be sought in assigning papers and in scheduling the resulting sessions.

There is overlap of interests among some of the various Societies Committees. Care should be taken to avoid having concurrent sessions in related areas. For example, the MTS Cables and Connectors Committee, Buoys Committee, and Ropes and Tension Members have very similar interests. Similarly, Sonar signal/Image Processing and Communications, which generally has a large number of papers presented, has many subtopics with overlapping interest.

Technical sessions must not be held concurrent with the plenary session, nor with the opening of the Exhibit.

Enough time must be allotted for refreshment breaks in mid morning and mid afternoon. The refreshments must be held in the exhibit area. This affords attendees opportunities to view the exhibits and talk with exhibitors.

The end of each day's session should be timed to not interfere with evening functions. An exhibitor's reception is held in the exhibit area on the first evening (Tuesday). A social event is held on the second evening. This social event is sometimes held at a different location, so time must then be allotted for transportation

The two Societies hold awards luncheons on the Tuesday and Wednesday, with the order alternating between the societies each year. There may also be a luncheon in the exhibit area on Thursday. Sufficient time in the technical program shall be allotted for these luncheons.

If the size of available meeting rooms varies, it may be necessary to consider the potential attendance when assigning meeting rooms. Attendance records for similar sessions at past conferences may provide some indication of potential attendance. Thus it may be necessary to consider availability of larger and smaller rooms when scheduling sessions. To the extent possible, multiple technical sessions on the same or similar subjects should be scheduled in sequence in the same room.

Section 5 - Conduct of Technical Program

As soon as the various technical sessions have been scheduled, session chairs shall be solicited and assigned. Two chairs should be assigned to each session. The respective Societies' Committee chairs should be asked to serve as chairs and to nominate or suggest members of the committee to serve as chairs.

It is desirable that at least one of the session chairs be experienced in serving as session chair or as an author at previous conferences. Pairing session chairs who are local to the venue with those from further away, possibly from other countries, will improve coverage of the sessions, may provide support for authors who are less comfortable with English, and also fosters collaborations.

Session chairs are required to read and check the papers in their session(s) in advance to verify that the papers have no obvious problems and are of reasonable quality. The Web Tools provide download links for individual session chairs to each paper for which they are responsible. Specifically, the papers should be examined for PDF eXpress conversion errors such as figures being bunched at the end of the document. The paper must not simply be a copy of the abstract. The paper must be original work and not something previously presented elsewhere. Detection of plagiarism will be enhanced if the session chairs are experience in the technical area covered by that session. Session chairs should contact the TPC if they find or suspect any problems. The TPC will contact the author(s).

The session chairs should contact the speakers in their session(s) prior to the conference to request biographical and background material from which the session chairs can prepare a brief introduction. The Web Tools provide email links for individual session chairs to each speaker.

The session chairs are responsible for making general introductory remarks to the audience, for

introducing the speakers, for keeping the speakers on schedule, and for facilitating questions at the end of each talk.

In the event that one or more of the speakers is missing, it is important that the schedule of talks not be altered. Many delegates move between technical sessions to hear particular talks, so it is important to remain on schedule. If a speaker other than the last speaker is absent, the session chair should find some means to fill that time slot so that audience loss is prevented or at least minimized. We suggest starting a general discussion on a topic of current interest for that technical area. This is another reason for selecting knowledgeable and experienced people to be session chairs. The session chairs must keep track of the no-shows.

The session chairs (and speakers) should attend the speaker's breakfast on the day of the session. Here they will meet the speakers, ensure they are present to present their papers, and review the procedures, particularly the timing requirements, with the speakers.

Section 6 - Publication of Technical Papers

The Final Program grid is prepared using the Web Tools and is comprised of the papers actually delivered by the accepted authors. As previously noted, approximately 80% of the accepted abstracts will result in a paper. The TPC will use the Web Tools to compress the Advance Program grid to form the Final Program grid. Four or five papers should be scheduled for each session.

The schedule of technical papers with room numbers and session chairs, the Final Program, is available through the Conference web site before the conference. This is a feature of the Web Tools. The Final Program is also published in the Conference Program (hard copy), which is distributed to attendees as they pick up their registration material. A feature of the Web Tools is an export document of the technical program as contained in the Final Program grid. The export can be incorporated (cut-and-paste) into the Conference Program so that manual reconstruction of the information is not necessary.

Each accepted and delivered technical paper scheduled for publication is provisionally published in the Conference Proceedings CD, which is distributed to attendees as they pick up their registration material. The Conference Proceedings CD has an index of authors, a list of key words, both linked to the particular papers, and a number of other features. The master copy of the Conference Proceedings CD is produced from the Web Tools database by the Societies' Contractor with the assistance of the OCEANS Webmaster, the TPC, and other members of the LOC.

Only papers presented at the conference are published in the IEEE Xplore database. Papers are excluded from publication in Xplore if they were not presented at the conference by either the primary author or a co-author. Some exceptions are made. An author may have had a sudden medical problem, for example. It is the responsibility of the TPC to compile a list, based on session summary forms issued to the session chairs (see document appendix), of all "no show" authors. The list should be provided to the OES Vice President of Conference Operations (JOAB). The VPCO is responsible for checking with the no-shows.

It is the responsibility of the Web Contractor and the Societies to produce and deliver the IEEE Xplore CD to IEEE for publication. It should be noted that it is Xplore that constitutes the citable repository for the papers; the Conference Proceedings CD is not citable.

The Conference Proceedings are distributed in Digital form only.

Section 7 - Plenary Session

The Conference shall open with a plenary session. The plenary session is intended to be of broad interest to all conference attendees. It features VIPs, dignitaries, and authorities from particular fields of local, national, and international concern. The JOAB will provide guidance in planning the session.

There must be only one plenary session during the conference. The plenary session should end by the middle of the first morning of the conference and be followed by the formal opening of the Exhibit Hall. Technical sessions shall not be conducted during the plenary session nor during the opening of the Exhibit. Other special sessions may be organized, but these must be part of the regular technical program.

Table 7 gives an outline schedule of the process for planning and conducting a plenary session.

The Plenary Session is held in a large auditorium or ball room to accommodate the anticipated audience size. Special attention and considerations should be given to the VIPs and dignitaries who participate in the plenary session.

Table 7 - Plenary Session Planning Schedule		
time	action	coordination
- 6 months	solicit suggestions for plenary session topics and speakers from LOC and from Societies	with LOC with Society officers and staff
- 5 months	prepare preliminary proposal for plenary session	
	send preliminary proposal to LOC and to Societies for review	
- 4 months	invite proposed plenary speakers	
- 3 months	confirm that invited plenary speakers will attend	
	ask plenary speakers for abstracts of talks and for biographical information	
	assure that suitable auditorium or ball room facility is available	with LOC
	prepare description of plenary session for publication	
- 2 months	publish schedule of plenary session on conference web site and through local, Society, and other appropriate publications	with conference web master
	publish schedule of plenary session in preliminary program	with LOC or other program publisher
- 2 weeks	assure that plenary speakers will be at conference	
	assure that appropriate arrangements are made to greet and handle VIP and dignitary plenary speakers	with LOC and Society staffs
- 1 week	assure that appropriate signs will be made for plenary session	with LOC

Table 7 - Plenary Session Planning Schedule		
- 1 day	assure that auditorium or ball room facility will be properly set up for plenary sessions	with LOC
conference	assure that signs are accurate	with LOC
+ 1 week	send thank you notes to plenary speakers (by mail)	with LOC

Section 8 - “OCEANS Conference” Student Poster Competition

The Conference shall include a Student Poster Competition. This competition involves students in the Conference, exposes students to the activities of professional societies, and provides students opportunities to interact with professionals.

The LOC shall appoint a Student Posters Committee to develop and conduct the competition. The Student Posters Committee reports to the TPC Chair.

The Societies’ student chapters should be asked to participate in promoting the competition. The Societies’ Committees might be asked for advice and support in planning the session.

Table 8 - Student Poster Planning Schedule gives an outline schedule of the process for planning and conducting the Student Poster Competition.

The Student Poster Competition is open to all engineering and science undergraduate and graduate students of any tertiary level university or college worldwide.

A Call for Student Posters should be distributed widely to colleges and universities that have ocean related departments and curricula. The Call for Student Posters shall be publicized on the Societies’ web sites, and through the Societies’ newsletters and publications and other suitable publications. The Call for Student Posters must be part of the overall Conference announcement flyer.

Students should submit a two page paper proposal through the conference website, in the same manner as for technical paper proposals. These proposals are identified as Student Poster submissions as part of that process.

The Student Poster Program Plan should provide for approximately 20 students. This number depends on the availability of funding. More posters can be included if additional funding is secured.

Students, self identified, will check a box to indicate their interest in being ranked for selection for a Student Poster award (with indications that the Program is limited in number by the size of the grant from ONR or another agency but carrying free registration, paper publication fee, and some form of travel assistance). Student poster proposals are reviewed by some of the same reviewers that review the technical paper proposals. The reviewers should preferably include academics, but academics should not be asked to review student poster proposals from their institution. In any case the proposals shall be judged on the basis of the nature of the problem, work performed, results and conclusions.

The review and selection process for student poster proposals has two stages. In the first stage the student proposals are evaluated with the regular technical papers. They are not identified to the reviewers as student proposals during this stage. If the student proposal is rejected in this process, the student will not be considered for participation in the Student Poster competition. The reason for this is that substandard proposals should not qualify for the more competitive

student poster awards.

When the first stage of the student proposal review is completed, the accepted proposals are ranked by the Student Poster Competition committee. Student Poster acceptances are sent to the top (approximately) 20 students. Quite commonly a student may have been accepted during the first stage of the review process but fail to qualify for the Poster Competition. However, a student who has his proposal accepted during the first stage is, by definition, accepted in the regular technical program even though not accepted for the Student Poster Competition. As participants in the regular technical program, students must pay the regular paper registration fee just like every other author; there is no student discount for participation in the regular technical program.

Upon acceptance of the poster proposal, students are required to prepare a full paper and submit it through the conference website. Each manuscript submission must be accompanied by a brief biography, an endorsement by a University Advisor, and a copyright release.

The students are also required to prepare a poster, to be displayed at the Conference, summarizing the paper. The students are required to discuss and explain the poster during the Conference at assigned times.

The papers of the selected students are published in the Conference Proceedings. The papers of those students who present posters at the conference are then published in the IEEE Xplore database.

During the Conference the poster presentations are judged. Judges should be carefully selected, based on experience, in order to cover a wide range of marine disciplines. The judges should preferably include academics, but academics should not be asked to judge student posters and papers from their institution.

Monetary prizes are awarded to the top poster presentations. The awards are presented to the students during a Conference banquet or other suitable event.

All students selected for the Student Paper Competition are given a complimentary full conference registration and an allowance for travel and conference expenses.

A budget for the OCEANS Conference Student Poster Competition shall be included as a line item in the Conference budget. This includes reimbursing student travel and lodging expenses and cash prizes. Typically this is funded by the Office of Naval Research (ONR). Historically the amounts have varied from 25,000 USD to 40,000 USD. If no grants are received OES will cover the expense of the student competition at a minimum of \$15K. MTS may also provide financial support.

Table 8 - Student Poster Planning Schedule		
time	action	coordination
Previous Conference	Prepare web site with advanced call* for student posters, giving general information for potential presenters and stating when web site will be open for poster proposals.	with conference web master with papers web master
	place advanced call* for student posters in delegates CD	with CD editor and producer
	distribute printed advanced call* for student posters at conference	

Table 8 - Student Poster Planning Schedule		
	* The call for student posters shall be made part of the call for technical papers and include the option for oral presentation as well as poster presentation. It shall be specified that the student poster submission will include a paper and the poster proposal shall be identical in length and format to a regular paper proposal.	
- 7 months	review adequacy of space for student posters at meeting facility	with LOC
- 6 months	open web page for acceptance of student poster proposals including an optional selection of oral presentation by the student	with papers web master
	solicit proposals for student posters directly from colleges and universities, through Societies, and through Society newsletters and other publications	through JOAB representatives
	place call for student posters on conference web page	with conference web master
- 5 months	follow up on solicitation of student posters	through JOAB representatives
	solicit student poster reviewers directly and through Society committee chairs	through JOAB representatives
- 4 months	close acceptance of student poster proposals	
	assign all student paper proposal reviewers, based on technical area. Send emails notifying reviewers without identifying the paper proposals as being student poster competitors. Put a high emphasis (priority) on reviewing these papers first.	
- 3.5 months	complete review of paper proposals by regular reviewers. Ratings below the cutoff shall exclude the student from the ranking of student posters. The cutoff threshold might be adjusted by the Student Poster Chair within acceptable limit and in conjunction with the TPC.	
	an email rejection shall be sent for the poster below the threshold. Assign all student poster paper proposals to student poster reviewers. These reviewers are not only selected for technical area and must rank all the reviewed and accepted posters.	
	An acceptance email shall be sent for a ranking above the Student Poster Program cutoff. It must specify if the poster is also presented as a regular paper. A rejection from the Student Poster Program but acceptance to the regular technical program must be sent for the ones having made the threshold but not the cutoff.	
	make advanced arrangements for reimbursement of student travel expenses	with LOC
	arrange for registration of student presenters	conference registration

Table 8 - Student Poster Planning Schedule		
	arrange for judges of student posters	
- 3 months	include student poster “papers” in technical program session grid	with TPC
	complete ranking of the student posters and establish the cutoff for applicants to the student poster submissions	with TPC
	send acceptance emails with instructions to student poster applicants above the cutoff and rejection emails to those below the cutoff	
- 2 months	publish schedule of student poster papers on conference web site	with conference web master
- 2 weeks	assure that students will be at conference to present student poster papers	
	assure that judges will be at conference	
- 1 week	assure that appropriate space is allotted for student posters and that appropriate boards will be available for displaying posters	with LOC
	assure that sufficient local staff will be available to help students set up posters and to assist student poster judges	with LOC
	assure that appropriate signs will be made for student posters	with LOC
- 1 day	assure that student poster paper space and boards are properly arranged	with LOC
	assure that signs are accurate	with LOC
conference	assure that student posters are properly set up	with LOC
	brief judges on procedures and responsibilities	
	brief students on procedures	
	administer judging of student posters	
	make arrangements to announce student poster winners at banquet or social	with LOC
	make arrangements to give monetary rewards to student poster winners	with LOC
Last day of conference	arrange for payment of travel expenses to student poster paper presenters	
+ 1 week	send thank you notes to student poster paper presenters, student advisors, judges, and abstract reviewers (by mail)	

Section 9 - Tutorials Sessions

The Conference shall include tutorial sessions. Tutorial sessions are held on Monday, the day before the formal opening of the conference. They are given in the technology areas related to those highlighted in the Call for Papers.

The LOC shall appoint a Tutorials Committee to develop and organize the Tutorial sessions. The Tutorials Committee reports to the chair of the LOC but coordinates with the TPC and also with the JOAB tutorial coordinator.

Table 9 gives an outline schedule of the process for planning and conducting the Tutorial sessions.

The tutorials are essentially special classes describing the fundamental elements of a technology subject. They are full or half day sessions. Tutorials are meant to compliment the technical program. They do so by describing the fundamental elements of a technology and/or rudiments of a subject in a classroom setting. In this way, a participant has the opportunity to learn the how-and-why of a particular subject or field of technology. There is also a benefit to speakers. Delivering a tutorial allows them an occasion to share their knowledge and expertise with other members of the ocean engineering/marine technology community.

Tutorials shall be solicited much in the same manner as technical papers. The tutorial solicitation may be included in the Call for Papers, or it may be issued separately.

Tutorial proposals shall include a 500 to 1000 word abstract of the intended tutorial. The abstract shall explain the utility of the tutorial and the intended audience. The abstract shall indicate if a half-day or full-day session is intended. An outline of the material to be presented should accompany the abstract. Tutorial proposals shall also include a 200 to 1000 word biography of the instructor.

The tutorial abstract and the instructor biography will be used to apply for Continuing Education Units (CEUs) through the IEEE. The JOAB Tutorials Coordinator will work with the LOC to ensure that all paperwork related to CEUs is completed as necessary.

Registration for the tutorials is handled by the conference registration site. It is in addition to standard conference registration fees.

There are ground rules of interaction between the Conference Committee and Instructors that define the separate areas of responsibility. The committee has to concur prior to any formal contract with potential instructors. The formal contract shall include:

- The agreement date between the OCEANS'XX MTS/IEEE and the name, address and country of the Instructor.
- The Tutorials parameters. This includes tutorial title, date, place, duration, and description of pertinent subject material as specified in the title of the tutorial. Due to time and room constraints, no tutorial shall exceed 4 hours in duration for each half day session.
- Rights and Responsibilities. Preparation and performance of the tutorial shall involve the following rights and responsibilities:
 - The Instructor shall provide standard PowerPoint (or other commonly used application software) slides covering the subject matter to be delivered during the tutorial. In order to facilitate timely acquisition of appropriate A/V supplies, the Tutorial Committee shall be notified a minimum of eight weeks prior to the tutorial date if video tapes or other necessary materials are scheduled to be presented during the tutorial.
 - The Instructor shall also provide the Tutorial committee with a set of class

notes. The cost of reproduction of these notes will be covered by the conference.

- The conference registration will provide attendees with proof of registration. The Instructor will be responsible to ensure attendees are registered for their specific tutorial by collecting this proof of registration.
- The Instructor shall distribute evaluation forms and tracking forms for Continuing Education Units to the participants at the end of his session. The Instructor shall then collect both sets of forms and deliver them to the Conference Committee.

As full consideration for the Instructor's complete and satisfactory performance of the responsibilities set forth in Rights and Responsibilities (paragraph above), OCEANS'XX shall pay the Instructor an honorarium in the amount determined by OCEANS'XX. The payments are based on comparable schedules for the distribution of funds used in payment of instructors at other training courses. Tutorial instructors are compensated in accordance with the number of tutorial registrations.

The Instructor agrees that OCEANS'XX shall have the right to use the Instructor's name and affiliation in connection with the advertising and promotion of the conference.

The Instructor makes the following warranties and representations: that he or she has full power and authority to enter into this agreement; that the tutorial material to be presented shall be unclassified and not pose any security risk to any country or government; and that the materials presented and disseminated shall contain no material that will be obscene, libelous, injurious, or contrary to law or that would infringe upon any proprietary or personal right or copyright.

If materials delivered to the OCEANS'XX for dissemination to the attendees, or presented by the Instructor are protected by copyright, the Instructor agrees to secure written permission to reprint and disseminate such material from the copyright owner(s), and to furnish OCEANS'XX with letters granting permission to reprint that material in the tutorial hardcopies handed out to the attendees. If the Contributor is prevented from securing such permission by reasons beyond his or her control, the Contributor shall promptly notify OCEANS'XX of this fact a minimum of eight weeks prior to the tutorial date, and appoints OCEANS'XX his or her attorney-in-fact for such purposes.

The following forms are Mandatory for Tutorials to offer Continuing Education Units:

- Application – one form for each tutorial. The JOAB Tutorials Administrator will work with the Conference Tutorial Chair to have these forms completed.
- Tutorial Evaluation by participant – distributed and then collected by the Presenter at the end of the session
- Continuing Education Units Tracking form – completed by each participant who is interested in receiving CEUs. Distributed and then collected by the Presenter at the end of the session.
- Program Summary – completed by the JOAB Tutorials Coordinator in conjunction with the Conference Tutorial Chair

The following form is optional:

- Program Assessment form – for internal use only to assess the success of each tutorial

The cost for the continuing educational units shall be shared between the Societies.

There has been a large variance in attendance of tutorials from year to year (independent of topic area and speaker), but the average is 12 -18 people per tutorial. Some have had up to 40 attendees, and some as few as 5. In cases where the instructor is well known and has successfully given his tutorial before with a large audience, he might be invited back on a regular basis. In other cases, where a well known teaching team has presented a short-course in a full day session, there may be reason to invite them back as well. In still other cases, noted professional tutorial givers have been known to draw average to large audiences.

It is necessary to determine the profit margins of each tutorial, and a courtesy to notify instructors the day of the conference what they could expect as a check for their efforts. Here is a suggestion on how to calculate the instructor's honorarium:

NUMBER of Attendees	HONORARIUM
$N \leq 10$	500 USD
$11 \leq N \leq 29$	$500 + (40 * (N-10))$ USD
$30 \leq N$	$1260 + (20 * (N-29))$ USD

We consider that the cost of photocopies and room equipment is paid by the conference and that the instructors have to pay for their travel and lodging. The instructors have to register for the conference separately if they want to attend.

Tutorials that attract fewer than 4 participants may be cancelled. However, the honorarium should still be paid to the presenter.

Suggested registration fees for participants are given by the following table:

	Early	Late
	Half/Full	Half/Full
Members	175/250 USD	200/250 USD
Non-members	200/300 USD	225/350 USD
Students	75/100 USD	100/150 USD

This would bring around 25% of the tutorial revenue to the instructors (with an average registration fee set at 175 USD per half day).

The following is a list of forms for all these purposes:

- Instructor Financing Accounting form for calculating the honorarium amount.
- Refreshment Accounting form for determining refreshment costs of the morning and afternoon sessions for each tutorial based on attendance.
- Finance Accounting form is a detailed financial assessment of each tutorial and is used retrospectively as a way of determining both popularity and profit.

- Share Accounting form gives a one page summary listing all tutorials and how much money was made by instructors and the conference.

Table 9 - Tutorial Program Planning Schedule		
time	action	coordination
Previous Conference	Prepare web site with advanced call* for tutorials, giving general information for potential presenters and stating when web site will be open for abstracts.	with conference web master with papers web master
	place advanced call* for tutorials in previous conference CD	with CD editor and producer
	distribute printed advanced call* for tutorials at conference	
	* the call for tutorials may be made part of the call for technical papers.	
- 7 months	review adequacy of space for tutorials at meeting facility	with LOC
- 6 months	open web page for acceptance of tutorial abstracts	with papers web master
	solicit abstracts for tutorials directly, through Societies, and through Society newsletters and other publications	through JOAB representatives
	place call for tutorials on conference web page	with conference web master
- 5 months	follow up on solicitation of tutorial abstracts	through JOAB representatives
	solicit tutorial abstract reviewers directly and through Society committee chairs	through JOAB representatives
- 4 months	close acceptance of tutorial abstracts	
	assign abstracts to tutorial reviewers	
- 3 months	complete review of tutorial abstracts	
	notify successful and unsuccessful tutorial presenters	
	Obtain signed agreements and make advance arrangements for reimbursement of tutorial stipends	with LOC
	make assignments of rooms for tutorials	with LOC
	arrange for payment of tutorial fees through registration web site	with conference web master and conference registration
- 2 months	publish schedule of tutorials on conference web site submit applications for continuing education units to IEEE	with conference web master
- 2 weeks	reassess advanced registration for tutorials, consider canceling tutorials with no registration (retain tutorial if 2 or more have preregistered)	with conference registration

Table 9 - Tutorial Program Planning Schedule		
	assure that presenter will be at conference to present tutorials	
- 1 week	assure that appropriate signs will be made for tutorial rooms. make copies of tutorial evaluation forms and CEU tracking forms for each tutorial conference. give completed tutorial evaluation forms and CEU tracking forms to JOAB tutorials coordinator	with LOC
- 1 day	assure that tutorial rooms are properly arranged	
	assure that signs are accurate	
conference		
+ 1 week	arrange for payment of stipends to tutorial presenters	
	send thank you notes to tutorial presenters (by mail)	

Chapter V - Exhibit

This chapter provides guidelines for soliciting and arranging exhibits at Oceans Conferences. Exhibits are a very important part of the Conference in that they increase attendance, provide important educational opportunities, and provide financial support for the Conference. The exhibitors are critical to the success of the conference and shall be treated accordingly. Similarly, the conference is critical to the success of the exhibitors and can, through proper organization and collaboration, contribute materially to a positive experience for both the exhibitors and the delegates.

The LOC shall organize an Exhibits Committee that is responsible for soliciting and planning the exhibits at the Conference. The chair of the Exhibits Committee should have prior experience in soliciting and planning exhibits, either at OCEANS conferences or at similar events.

The Exhibits Committee shall be comprised of people from the locality who are familiar with the conference facility and with local companies and organizations that might be potential exhibitors. It is also recommended that the Exhibits Committee include people who have exhibits experience from past conferences and people from the Societies who are familiar with national and international companies and organizations that might be potential exhibitors. Guidance and assistance shall be sought from the JOAB Administrator for Exhibits.

The Societies will support the Exhibit Committee and encourage companies and organizations to exhibit at the conference.

Section 1 - Soliciting Exhibitors

A Call for Exhibitors shall be included in the initial Conference Announcement.

An Exhibitor Information Kit providing full information for potential exhibitors shall be provided at least a year before the conference. The kit shall include information such as costs for exhibiting, the exhibit floor plan, demographics of the conference locality, statistics on attendance at past conferences, and the JOAB "Tips for Exhibitors" document. If applicable, it shall also include information on conference facilities, union policies and restrictions, local and national taxes and restrictions, customs fees, rebates, etc.

Exhibitors from previous Conferences shall be solicited. Exhibitors from other conferences, such as Underwater Intervention, OTC, Underwater Technology and other ocean-related conferences shall also be solicited.

Section 2 - Policies for Special Booths

Exhibitors like to meet with, entertain, and show their display to invited clients during the conference. To support this need, the Web Tools include an "Exhibit Only" registration type. There shall be no charge for these registrations. Exhibitors shall be instructed to let their customers know that they may register at the desk and receive a badge. Exhibitors shall also be permitted to register their customers in advance; customers then need only stop at the registration desk to pick-up their badge.

Each booth shall include one full conference registration (Exhibitor Full Registrations) as well as some number of "booth only" registrations (Exhibitor Booth Only) as specified by the exhibitor. These full registrations include tickets to all social events and the option of purchasing additional guest tickets for the events. The Booth Only registrations include a ticket for the Exhibitor Reception. Both of these registrations shall allow access to the Technical Sessions.

Additional Exhibitor Full Registrations may be included with a booth as negotiated with the Exhibits Chair in exchange for some financial or in-kind consideration from the exhibitor.

Exhibit space is often provided free of charge in exchange for advertising or other services. In other instances, free or reduced cost booths can be provided based on the situation and/or benefit to the conference by including certain exhibitors. These “special booths” are negotiated between the LOC and the exhibitor; the agreement is not for public release. In most cases, the agreement is for the floor space only. The exhibitor can arrange for outfitting the booth with the company handling the exhibits. Examples of some special booth policies follow:

- Contra deals with magazines– It has always been a practice of related industry publications (Sea Technology, Underwater Magazine, Ocean News & Technology, etc.) to receive free exhibit space in exchange for full page advertising in their publications. As a minimum, two full page ads are expected prior to the conference. Many of the publications will also provide pre- and post- conference articles if provided by the LOC.
- Barter trade for booth at another conference (Society or LOC) – One of the best methods to promote the conference is to trade exhibit space with other related conferences. This is usually done on a one-for-one space trade.
- Complementary booths for OES and MTS – The sponsoring societies shall always have side-by-side booths, fully outfitted to include a table, chairs, drapes, carpet with underpadding, waste basket, electricity, and internet. These costs shall be included in the conference budget. The Societies’ complimentary booths shall include full conference registrations for two approved Society representatives. They shall be located in a prime spot, not stuck in the back of the exhibit hall.
- Complementary booths for upcoming OCEANS conferences – As in the society complimentary booths, the upcoming OCEANS conferences will be provided with fully outfitted booths next to the society booths. The complimentary booths for the future OCEANS conferences shall include one (1) full conference registrations. Booth amenities and registrations shall be included in the conference budget.
- Companies who are also patrons – Free or reduced exhibit space can be provided to Patrons (those who financially support the conference such as sponsoring coffee, luncheons, etc.), however, such exchanges should be commensurate with the level of support. I.e., a free booth may be given to a patron who provides \$20K to pay for an event. However, in most cases, those companies who provide patron support are usually large exhibitors who normally do not expect such bartering.
- Government organizations – Government organizations are treated like any regular exhibitor. Most have budgets to cover exhibit costs. However, some government organizations (NSF, NOAA, etc) may become major patrons and some bartering for the cost of such space can be warranted. In the past, local naval units have provided display hardware (ROVs, submersibles, towed vehicles, dive apparatus, etc.) in exchange for free space in the exhibition hall. Again, this is handled on a case by case basis.
- Very small businesses, academic institutions, “non-profits”, NGOs, - In many cases, such organizations do not have the means to pay for exhibit space, although they usually have the volunteers who can cover the event. In the past, reduced cost, reduced size, and comp exhibit space has been given to organizations who provide a service that would be of benefit to the conference and the societies. Often, space is provided to display hardware such as human powered submersibles, etc. Last minute deals can be made to include such organizations based on space available. These deals must receive approval by the Presidents of the sponsor Societies.

Section 3 - Exhibitor Registrations

Each booth shall include one full conference registration (Exhibitor Full Registrations) as well as some reasonable number of “booth only” registrations (Exhibitor Booth Only) as specified by the exhibitor. The rule is to grant four (4) Booth Only registration per 10’x10’ booth with the addition of two (2) registrations per 10’x10’ additional booth space. The full registrations include tickets to all social events and the option of purchasing additional guest tickets for the events. The Exhibitor Full Registration allows also for one paper upload (no fee required), if an abstract has been submitted by a company staff member and accepted by the TP committee. The Booth Only registrations include a ticket for the Exhibitor Reception.

Both of these registrations shall allow access to the Technical Sessions.

Additional Exhibitor Full Registrations may be included with a booth as negotiated with the Exhibits Chair in exchange for some financial or in-kind consideration from the exhibitor.

Exhibitors like to meet with, entertain, and show their display to invited clients during the conference. To support this need, the Web Tools include an “Exhibit Only” registration type. There shall be no charge for these registrations. Exhibitors shall be instructed to let their customers know that they may register at the desk and receive a badge. Exhibitors shall also be permitted to register their customers in advance; customers then need only stop at the registration desk to pick-up their badge. To ensure accountability for all persons visiting the exhibits, they will be required to register for the exhibits only pass. The Exhibit Only Registration does not include admission to the Exhibitor’s Reception and any social event, nor does it allow access to the technical sessions.

Section 4 - Exhibit Space

Required (and strongly encouraged) elements of the Exhibit Space

- Displays in the exhibit hall (ISR, aquarium, waterfalls, vehicle tanks/pools, etc.) – such displays can add to the quality of the exhibits, but should not distract from the exhibits or exhibitor foot traffic. They should be intended as an enticement to visit the exhibits.
- Student Poster Area – The student posters shall be on display for attendee viewing, and also for judging, in the exhibit hall. The 20 or so posters usually take up a space equivalent to 2-3 exhibit booths.
- Exhibitor Lounge – It is a nice touch if an exhibitor only lounge can be provided with tables, chairs and refreshments where the exhibitors can relax. It would need to be in the exhibit area (depending on space) or immediately nearby. If a lounge is set up, it is wise to provide someone at the entrance to ensure only exhibitors are entering the lounge (unless they are being escorted by an exhibitor) because the refreshments can disappear quickly if it turns into a public lounge by mistake (which has happened in the past). Also, the LOC must ensure that the exhibitors are aware that the lounge exists.
- Cyber Café – the cyber café is located in the exhibit hall to draw attendees through the exhibit hall to check email, etc. A good location is often at the opposite side of the hall from the main entrance.
- Food/coffee stations – Shall be provided at multiple locations throughout the exhibit hall to ensure that all exhibitors are treated equally regarding foot traffic in the hall during the coffee breaks. Single, large lounges, located on one end of the exhibit hall tend to draw attendees away from the exhibits. It is better to have many locations where coffee can be served and attendees can relax.

The floor plan on **Figure 1** below is an example arrangement of the exhibit area in relation to conference activities within a venue. This is intended to illustrate how the exhibits should be the center attraction of the Conference, such that attendees pass through the exhibit hall as they go between Registration, Luncheon, Technical Sessions and Student Posters, and such that food service and tables and chairs are distributed around the Exhibit hall to encourage attendees to pass by and visit with each exhibitor's booth.

The layout of the exhibit space should draw foot traffic to and among the exhibitor booths. This is accomplished by interspersing refreshment and lounge stations among the booths, placing the student posters in a prominent central location, and, where possible, placing access to the technical sessions and luncheon spaces close to the exhibit space and such that delegates must pass through the exhibit to reach the meeting rooms and awards lunches. If a box or buffet lunch is held on Thursday, it shall be served in the exhibit space. The exhibit area is thus the focal point of the conference.

The morning and afternoon Technical Session breaks shall be held in the exhibit area. Coffee, tea, other beverages, and appropriate snack food shall be provided. The beverage and food service tables should be interspersed throughout the exhibit area. Sufficient chairs and tables for attendees to relax and mingle with the exhibitors during the breaks should also be distributed throughout the exhibit area.

An Exhibitors' Reception shall be held in the exhibit area on Tuesday evening. The food and beverage station placement during the Exhibitors' Reception shall promote movement throughout the exhibit hall. As with breaks, the beverage and food service stations and the tables and chairs for attendees shall be distributed throughout the exhibit area.

Distracting entertainment and presentations should not take place during the Exhibitors' Reception. Although billed as a social event, it is one of the best times to do business and that shall be the focus.

Section 5 - Exhibit Schedule

Table 10 shows the schedule for planning and organizing the exhibits at an Oceans conference.

Table 10 - Exhibit Planning Schedule		
Time	Action	Responsibility
-24 months	Determine pricing for booths in coordination with overall conference budget planning. Prepare preliminary exhibit floor plan, including the location of booths, lounges, student posters, food stations, etc.	LOC with guidance/approval from JOAB
	Prepare advertising material, which shall include booth pricing, exhibit floor plan, and general information for marketing to potential exhibitors.	Exhibit Committee
	Post Call for Exhibitors on conference website	LOC Webmaster
	Include Call for Exhibitors in Conference Announcement	LOC

Table 10 - Exhibit Planning Schedule		
	Distribute Call for Exhibitors to the past exhibitors list and to other identified potential exhibitors, especially local exhibitors. The JOAB Exhibits Administrator will provide a list of past OCEANS exhibitors.	Exhibit Committee
	Exhibit floor plan shall be available in the conference booth at previous OCEANS conferences where it can be used in signing up exhibitors.	LOC
	Develop detailed Exhibitor Information Kit to be used for marketing booth space and supporting exhibitors. Include web site address in brochure	Exhibit Committee with input from JOAB
	Distribute Exhibitor Information Kit to exhibitors at OCEANS Conferences and other relevant conferences and workshops	Exhibit Committee
	Prepare and distribute patron information. Be aware that the Societies have established policies that place some restrictions on the use of patron logos and other advertising.	Exhibit Committee with input from JOAB
- 12 months	Write and issue press releases in regional newspapers and relevant magazines during the full 12 months leading up to the conference.	Exhibit Committee
	Place announcements and promotional materials in relevant industry publications during the full 12 months leading up to the conference. Booth space may be bartered for advertising space.	Exhibit Committee
	Continue to update website information on exhibit spaces and other relevant information	LOC Webmaster with input from Exhibit Committee
	Monitor negotiations and the performance of the decorating, transportation and support contractors leading up to the conference. Finalize contracts for coming year.	Exhibit Committee
- 12 to -1.5 months	Solicit and secure contracts with exhibitors. Distribute Exhibitor Information Kit, which may now contain additional material. Keep exhibitors up-to-date throughout the months leading up to the conference.	Exhibit Committee and Finance Chair
	Obtain company profile and other relevant information to post on website and include in conference program. Post the profiles on the website as contracts are signed. Include dynamic announcements about recent additions. Maintain a dynamic list showing the booth location of each exhibitor.	Exhibit Committee and LOC Webmaster
	Prepare and issue press releases on exhibitors of special regional interest.	Exhibit Committee

Table 10 - Exhibit Planning Schedule		
	Regularly review and modify the website to make sure everything is posted and up-to-date.	LOC Webmaster
-2 months	Initiate contact with local media to arrange coverage of the conference.	Promotion Chair
-2 weeks		
	Identify unsold booth space. Rearrange as necessary to fill this space with food service or lounge area or as extra space for Societies or for other “worthy causes”.	Exhibit Committee
	Contact local media to finalize arrangements for coverage of the conference.	Promotion Chair
-1 Day		
	Monitor setup of exhibits. Provide support as necessary. Restrict entry to exhibit area to exhibitors and other persons with “need to enter”.	Exhibit Committee
		Exhibit Committee
Conference	Monitor exhibits; make sure the exhibitors are happy. Provide support as necessary.	Exhibit Committee

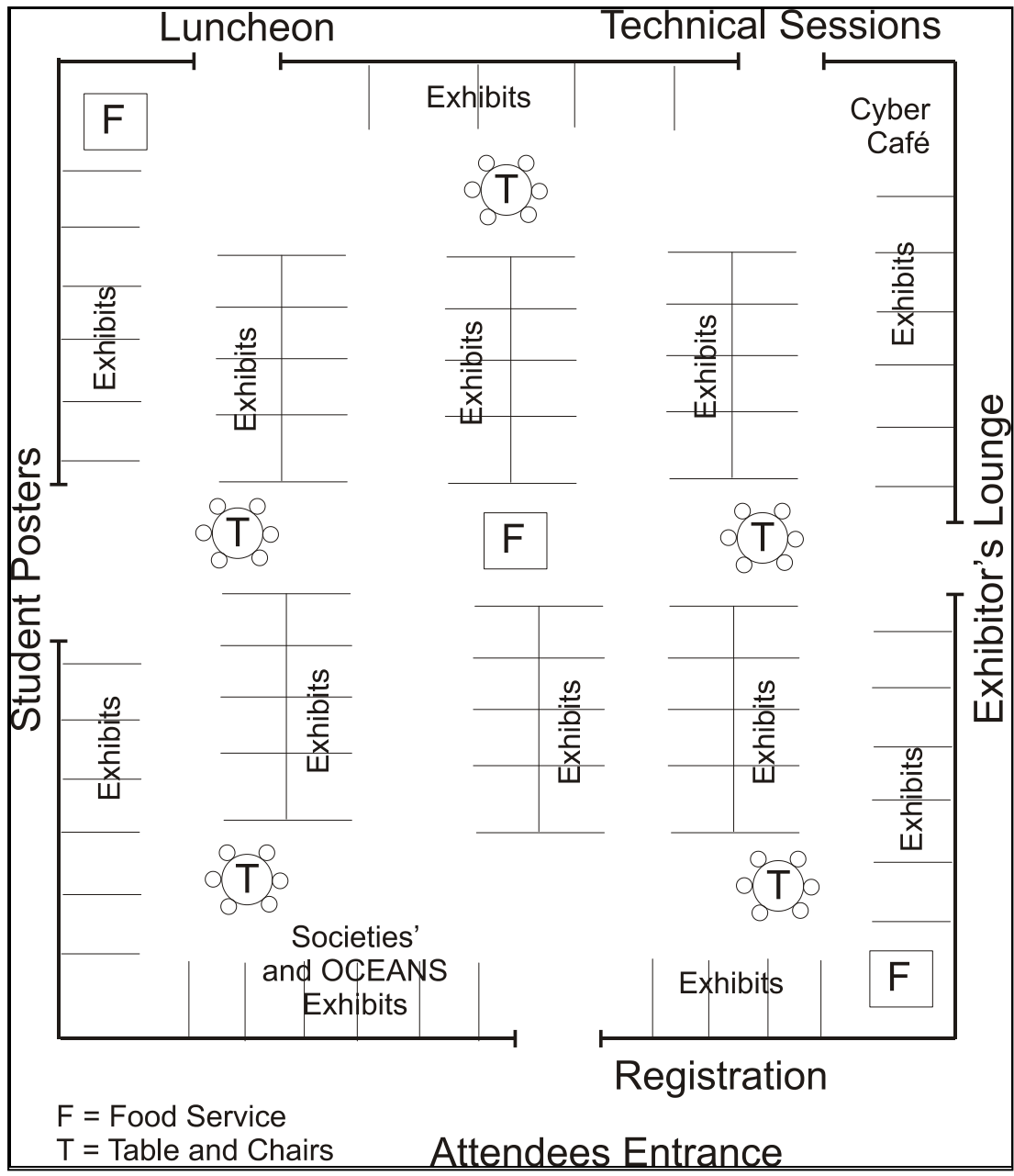


Figure 1 - Recommended arrangement of Exhibit Hall and relation to other Conference functions.

Chapter VI - Web Tools Modules

The Societies have developed a suite of web tools that shall be used by LOCs in organizing and running OCEANS Conferences. The tools are comprised of four modules:

- Content Management System (CMS)
- Technical Program Module (TPM)
- Delegate Registration Module (DRM)
- Exhibitor Registration Module (ERM)

The web tools provide a set of administrative interfaces for

- Acquiring and accessing conference information
- Managing conference processes
- Generating public web content
- Generating public web interfaces

They are a comprehensive and growing package of integrated tools and databases designed specifically to run an OCEANS Conference.

The tools were built and are presently maintained by a Web Company under contract to the Societies. The contract specifically names a single point of contact, the OCEANS Webmaster, who is responsible for coordinating tasks, evaluating requests, and setting priorities across several OCEANS Conferences simultaneously, in coordination with JOAB. Members of the LOC will, at times, work closely with the OCEANS Webmaster as well as with the Web Company. Note that this company works for the Societies under the direction of the OCEANS Webmaster and is not under contract to the LOCs. Communications with the Web Company shall always go through and include the OCEANS Webmaster and the officers in charge of the Conference Operation.

Section 1 - Initial Web Presence for the Conference

The LOC is encouraged to establish a presence on the web early in the process of putting on the conference. This may take place any time after official approval of the LOC and venue by the Societies and before the conference website is established using CMS. To establish a web presence the LOC shall deliver the following items to the OCEANS Webmaster and the Web Company:

- **Material for a splash page on the conference URL:** Single page MS Word, Adobe PDF, or MS PowerPoint files are suitable. Raw image files with a guide to layout and text are also acceptable. At a minimum the page should include:
 - Conference name - see Naming Convention and Website URLs
 - Conference dates
 - Conference theme
 - Email link for further information –the Societies will provide a standard alias such as info@oceans07ieeeeaberdeen.org or info@oceans07mtsieevancouver.org that points to an email address or addresses provided by the LOC for this purpose.
 - Suitable graphics and text to promote the venue.

- **Material for a banner link on www.oceansconference.org:** Visit this page to see examples. The LOC will need to provide:
 - Thumbnail image that they wish to identify with the conference. The conference logo or a modified version of the logo is a suitable choice.
 - Conference dates
 - Conference theme

Section 2 - CMS - Content Management System

CMS is a GUI based website design and layout tool used to build the public side of the conference website. The LOC should include a webmaster or a web coordinator. The webmaster should be a web savvy person who will use CMS and who will co-ordinate closely with the LOC, particularly the Technical Program Committee Chair (TPCC), to place content on the website in a timely fashion. If the webmaster is under contract rather than a volunteer on the LOC, a web coordinator on the LOC should be responsible for overseeing the webmaster. Budget appropriately for a paid or volunteer webmaster. While it is not essential, it will help if the conference webmaster or at least the web coordinator is a regular participant in OCEANS Conferences.

Website content includes information about the LOC, the venue, the Technical Program, the conference schedule, and announcements. Additionally, the Web Tools include a number of dynamically generated pages, such as the Paper Proposal Submission page and the searchable Advance and Final Program pages, to which the conference webmaster will need to provide links from the public website at certain times during the run-up to the conference.

Before CMS can be enabled for a particular OCEANS Conference, the LOC is required to provide a "template file" to the OCEANS Webmaster and the Web Company. The template file contains the basic "look" of the site, including images, logos, color schemes, backgrounds, headers, and footers. This material will be developed by the conference webmaster working with the LOC and with the OCEANS Webmaster and the Web Company. Once completed, the material will be incorporated into the site by the Web Company, CMS will be enabled, and the conference webmaster will be able to begin building the public side of the conference website.

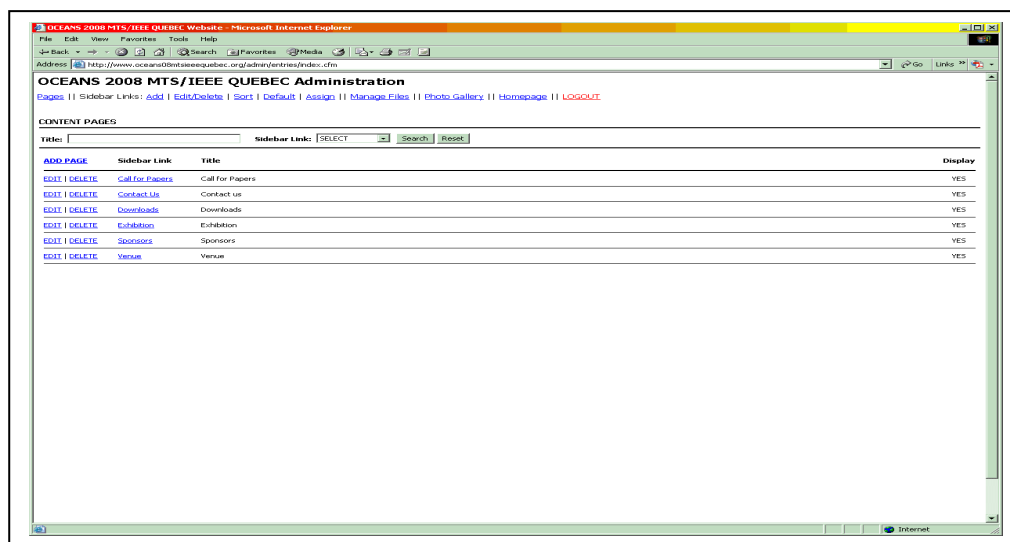


Figure 2 - Top level CMS interface

Figure 2 shows the top level CMS interface from which site structure and cross links are

created and controlled. **Figure 3** is an example of the GUI editor used to build and layout individual pages of the website.

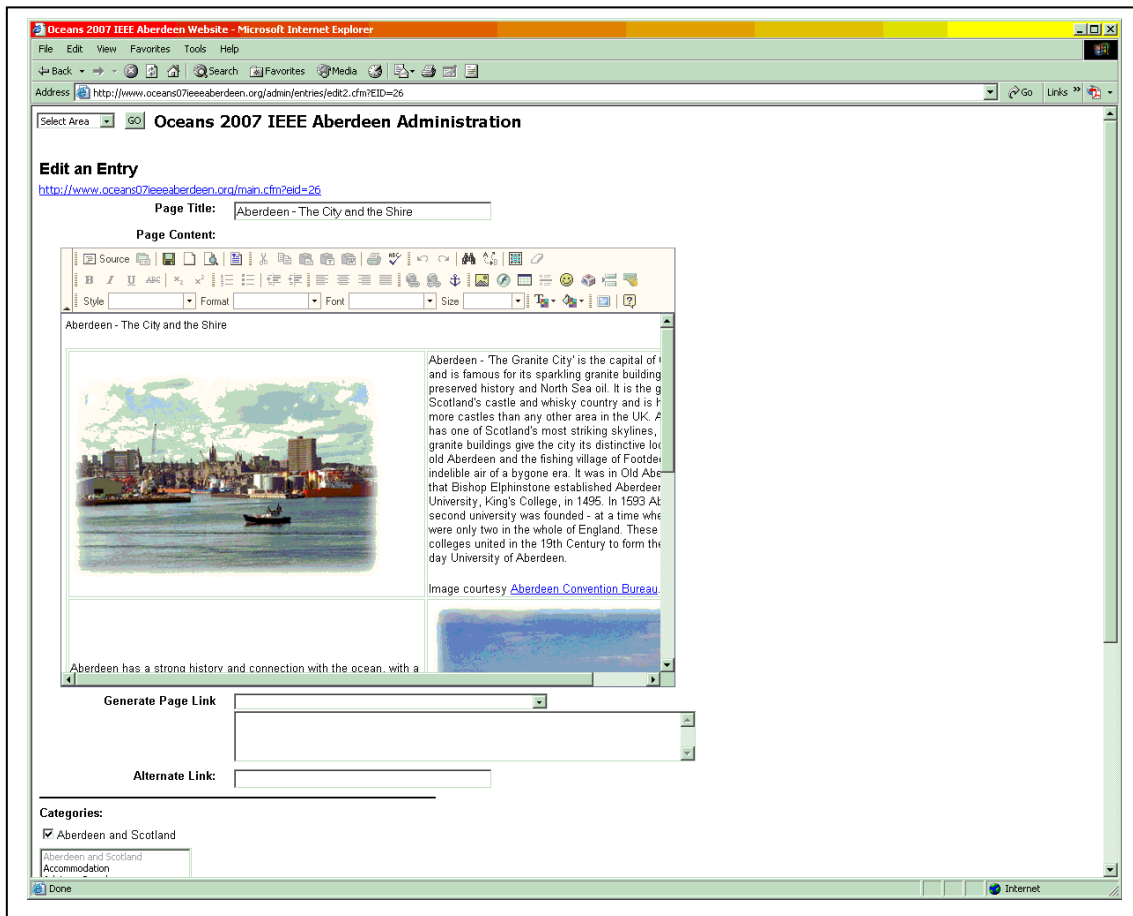


Figure 3 - Content editing tool used to construct individual pages

Section 3 - TPM - Technical Program Module

TPM is a browser based module used to build the technical program beginning with paper proposal submission and culminating in the generation of a master copy of the Delegate Proceedings¹ on a CD-ROM. The LOC must include a Technical Program Committee Chair (TPCC) who will coordinate and manage this process using the Web Tools. Well-coordinated Technical Program Committee Co-Chairs are an option.

The TPCC is a critically important and pivotal role for the LOC if the conference is to be successful. The selection of a suitable person or persons should be made with care and deliberation. The TPCC should have a broad knowledge of the field of oceanic engineering/marine technology, be well connected with colleagues across the community, and be a regular participant in OCEANS Conferences. He or she must also be able to dedicate a

¹ The Delegate Proceedings CD is comprised of the papers in the Final Program of the conference. These are the accepted paper proposals that resulted in a paper. Copies of this CD are distributed to delegates at the conference. However, this is not the official Proceedings of the conference; the papers are not, at this point in the process published, nor can they be legitimately cited in later work. A condition of publishing a paper is that it is actually presented in one of the technical sessions. Accordingly, the TPCC will prepare a list of "no-shows" for the Societies. After the conference, the Societies will contact these authors and, in the absence of some reasonable justification for not presenting the paper, will remove those papers from the official Proceedings. A second CD, with the unexcused no-shows removed, will then be prepared and sent to IEEE Xplore. Inclusion in Xplore constitutes official publishing of the work. Publications in Xplore may be legitimately cited in later work.

significant amount of time to the job and be well equipped to organize and manage information and people. The latter category includes reviewers and authors as well as committee members. Being the TPCC can be at least a half-time job beginning approximately 1 year before the conference. Beginning 6 to 8 months before the conference, if not sooner, it can be a full-time job.

The TPCC will work closely with the Technology Committees Coordinator (TCC) of OES and the Professional Committees Coordinator (PCC) of MTS. The Technology and Professional Committee Chairs form the core group of reviewers for the OCEANS Conferences. These chairs can supply additional reviewers as needed when requested by the TPCC through the TCC and PCC. This core group of reviewers should be augmented by additional reviewers selected by the TPCC and the LOC. Approximately 150 reviewers will be needed for a typical OCEANS Conference.

Before TPM can be enabled for paper proposal submission, the TPCC and the LOC must submit a set of venue specific technical topics to be added to the core list of Technical Areas developed by the Societies. These "Local Flavor" topics, which are generally of both venue specific and current/topical interest, are developed by the LOC to showcase the venue, to address topical subjects, and to focus attention on the theme of the conference. The technical topic list for the conference shall be comprised of the local and OCEANS core lists. The Local Flavor topics are one of the important ways in which the LOC can make the conference stand out with its own identity.

The technical program process begins with paper proposal submission. This is done on-line by the authors. The TPCC monitors progress, assists authors as necessary, and is responsible for ensuring correct binning of the submitted paper proposals by Technical Area so that reviewers can be correctly assigned. The larger job at this stage is recruiting and organizing the reviewers. Reviewers are assigned by Technical Area and by priority review. Each paper proposal should receive at least 3 separate reviews. No individual reviewer should be tasked with more than 20 paper proposals to review. The TPCC will work with the Societies and the reviewers to accomplish this task.

Once the reviews are complete the TPCC, working with the TPC and assisted by the TCC and PCC, will select the most highly rated paper proposals for inclusion in the technical program, and will inform the authors of the decisions. Authors will then write their papers and upload them to the website. The TPCC monitors progress, assists authors as necessary, and ensures compliance with publishing requirements. These requirements include copyright submission, PDF eXpress compatibility, and paper registration. A comprehensive list is provided in the Technical Program Requirements section of this chapter.

It is important to note that the Student Poster reviews are part of the general review process. The Student Poster Chair should be part of the TPC and needs to coordinate with the TPCC. Submissions for the Student Poster Contest are first reviewed as regular paper proposals. Those that are accepted go on to be ranked for inclusion in the Student Poster Competition. The top 20 Student Poster proposals (approximately, this is budget dependent) will be admitted to the competition. The remaining accepted Student Poster proposals are, by definition, accepted for the regular Technical Program. The latter do not receive any financial support nor do they receive a student discount.

Once the acceptance decisions have been made, the TPCC, working with the TPC and assisted by the TCC and PCC, will begin organizing the sessions for the conference. This is an iterative process. It begins based on the list of accepted papers. These must all be group into technical sessions with in an initial schedule. The Web Tools provide utilities for defining, filling, manipulating, and querying this program "grid". Once complete, this version of the grid is the Advance Program for the conference and it is published on the website using the Web Tools.

The Advance Program, based on the accepted paper proposals will not simply become the Final Program because not all accepted proposals result in a paper. The attrition rate is often as high as 20% and you should be prepared for this in planning the Technical Program. Because of the

attrition, a later step during which the TPCC will compress the grid will be necessary to assure well grouped full sessions in the Final Program. During this part of the process the TPCC will also need to review and clean the database to regularize author affiliations, capitalization, obvious misspellings, etc. The Web Company will provide a spreadsheet export to support this exercise.

When the Final Program is set and the database is clean, the database will be frozen and the TPCC will work with the OCEANS Webmaster and the Web Company to generate the master Delegate Proceedings CD. This is an interactive process requiring 10 days. The Web Company will provide a Technical Program export that the LOC will use to produce the Conference Program booklet for delegates. Other material, such as welcome letters from the General and Technical Program Chairs, LOC members listing, schedule of social events, hotel accommodations, transportation arrangements, The Exhibit and a list of exhibitors, etc., should also be include in the booklet.

Most of this material can be prepared in advance by the LOC so that it only remains to add the Technical Program export (and the Exhibit export from the ERM). The completed Conference Program document must be returned from the LOC to the OCEANS Webmaster and the Web Company for inclusion on the master Delegate Proceedings CD. Clearly this is a busy time and good coordination and responsiveness by the TPCC and other pertinent LOC members with the OCEANS Webmaster and the Web Company will be important. Anticipate this need and set your schedules accordingly.

The LOC will also be responsible for providing an image or images for a “splash page” to the Web Company for inclusion in the Proceedings. The splash page is a required feature of the Delegate Proceedings CD; the CD opens to this page when inserted into a drive. There is some required text that will be provided. The banner from the conference website, or some variation, is often an eminently suitable choice for the splash page image. The master Delegate Proceedings CD-ROM will be sent to the LOC so that they can make copies for the delegates. The material will also be made available to the LOC via FTP. The LOC is responsible for CD and jewel case labels. Additional copies of the Delegate Proceedings CD should be delivered to the sponsoring Societies after the conference.

The splash page and labels are required to meet certain publishing requirements. For example, an ISBN number must be acquired by the TPCC through the Societies and included on the splash page and labels. For OCEANS Conferences in which IEEE holds the copyright (even years in North America, all years in Europe and Asia-Pacific), the ISBNs (electronic and print pairs, we use only the electronic half of the pair) will be supplied by IEEE. To obtain the information the TPCC should register the conference on-line through the IEEE website, www.ieee.org. A Letter of Acquisition (LOA) will be provided and should be shared with the OCEANS Webmaster and the Web Company. For OCEANS Conferences in which MTS holds the copyright (odd years in North America), you will obtain the ISBNs from MTS. Again this information should be shared with the OCEANS Webmaster and the Web Company. It will also need to be shared with IEEE since the Conference Proceedings will eventually be supplied to IEEE Xplore.

Regardless of which Society holds the copyright, you will need to register the conference with IEEE for access to a conference specific PDF eXpress portal. This is done on-line through the IEEE website. The authors will convert their papers to PDF eXpress compliant form through the portal.

The Web Tools support and facilitate all stages of this process. This includes working around spam filters and chasing recalcitrant reviewers and authors. Allow time for these activities; they are non-trivial and quite time consuming. You will work at all times in close coordination with the OCEANS Webmaster and the Web Company. The Societies, particularly the OES TCC and the MTS PCC, will provide oversight and guidance to assist the TPC and the TPCC through the process. Even with this assistance and guidance the workload remains significant. Plan accordingly.

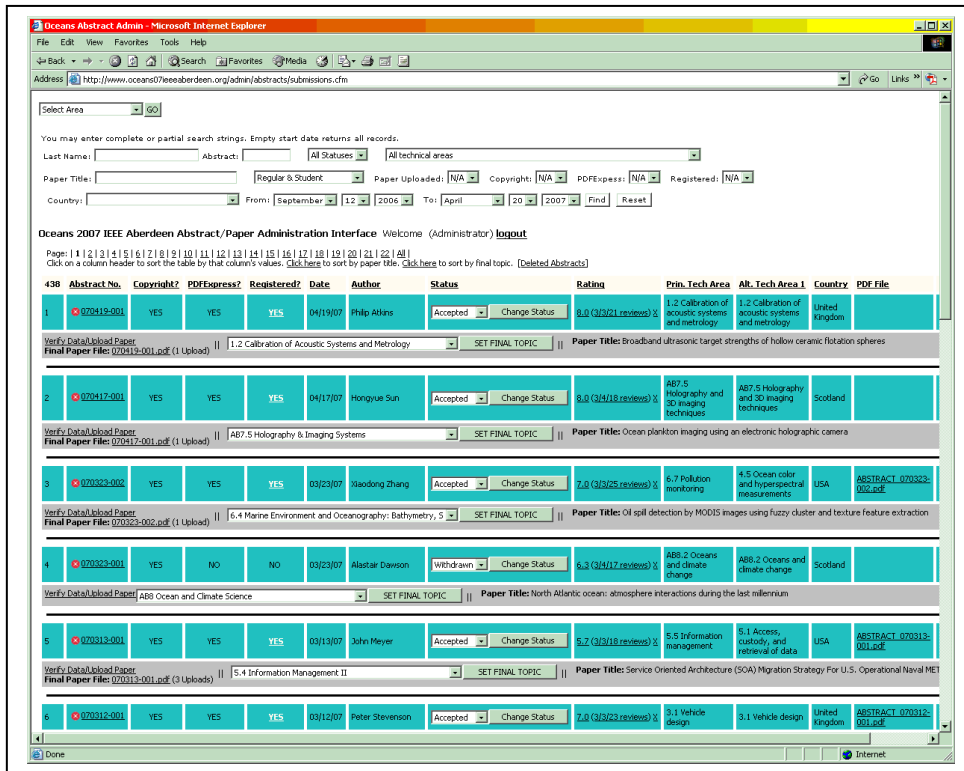


Figure 4 - Main TPCC interface through which abstracts and papers are managed

Figure 4 and Figure 5 show two of the dozen or so pages that comprise the TPM admin interface. The page in Figure 4 is the main control interface for management of paper proposals and papers.

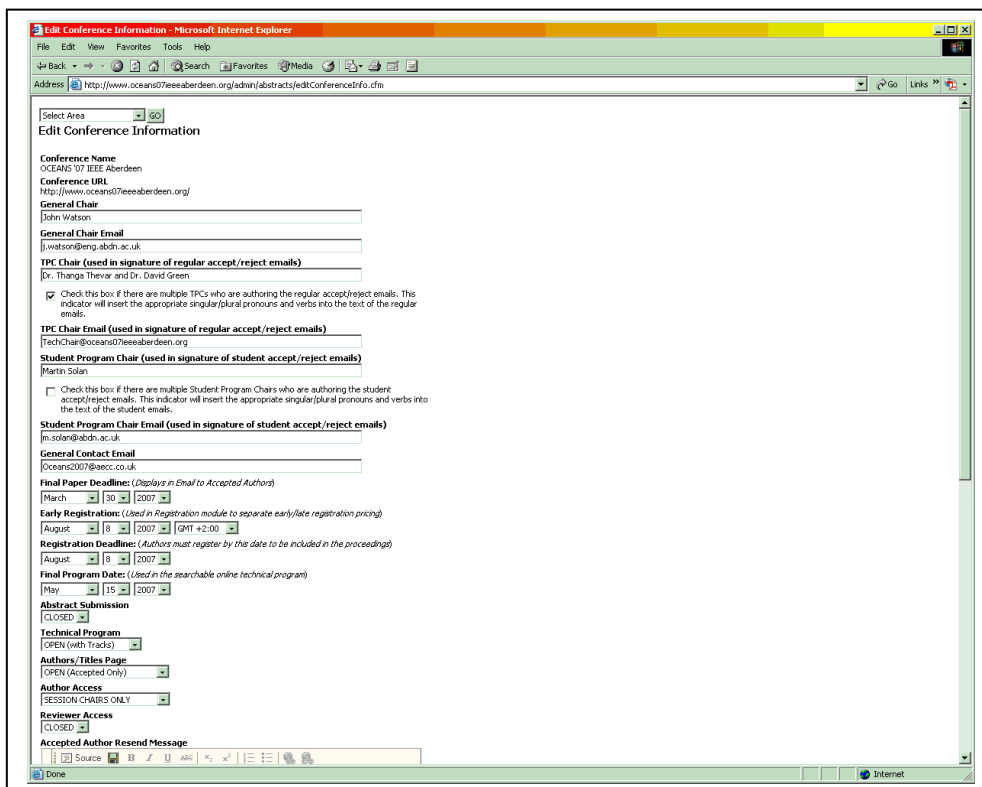


Figure 5 - Conference information control page

Figure 5 shows part of a high level control page where conference information (e.g., paper upload deadlines) is entered and where information flow and access (e.g., public access to dynamically generated information pages) are controlled. Other pages in the TPM interface support management of the Associates (TPCC assistants), Reviewers, Authors, and Session Chairs. An additional suite of pages and features are used to build and manage the grid. All of the interfaces, tools, and database components are integrated and cross linked.

Section 4 - Technical Program Requirements

- Copyright (alternating each year between MTS and OES) is required for inclusion of the paper in the Technical Program and Proceedings.
- PDF eXpress is required for inclusion of the paper in the Technical Program and Proceedings.
- Payment of a Paper Registration fee is required for inclusion of the paper in the Technical Program and Proceedings. A Paper Registration includes a full registration for the conference for one of the authors and can be applied to up to two additional papers on which that person is also an author. This applies to students participating in the regular Technical Program. A student registration cannot be used to qualify a paper for the regular Technical Program. A full Paper Registration fee must be paid. This rule also applies to participants in the Student Poster Program; however the Paper Registration fee is automatically waived.
- Full Registrations associated with the purchase of a booth or booths in the Exhibit may not be applied to a Paper Registration to qualify a paper for the Technical Program. A separate Paper Registration fee must be paid.
- Oral presentations are only allowed if a paper of acceptable length and quality has been received by the due date and only if it meets all of the requirements above. This is colloquially known as the "No paper, no presentation" rule.
- If no oral presentation of the paper is made at the conference, the paper will not be included in IEEE Xplore, the citable on-line database. This is colloquially known as the "No show, no Xplore" rule.

The copyright, PDF eXpress, Paper Registration fee, and “no paper, no presentation” requirements are largely enforced through use of the Web Tools. Paper upload is blocked by the Tools until the copyright, PDF eXpress, and Paper Registration requirements are met. There are overrides for special cases such as use of a hardcopy rather than on-line form for copyright execution. Accepted Paper Proposals that do not result in a paper are marked Withdrawn and are not included in the grid. Thus they are not scheduled in Technical Program and no presentation can be given.

The Technical Program Chair, with assistance from the LOC and the Societies as necessary, is responsible for enforcing these requirements. No exceptions are to be made.

Section 5 - DRM- Delegate and Exhibitor Registration Module

The DRM is a browser based module providing an administrative interface and public registration pages. Conference information such as tutorials and social events are defined through the administrative interface and the tools automatically and dynamically generate the public pages and maintain a delegate database. The database can be manipulated and queried using the administrative tools.

The LOC should include a Registration Coordinator (RC) who will oversee and manage this process and who is familiar with both financial matters and with OCEANS Conferences. The

RC will work with the TPCC and the Financial Chair as well as with the OCEANS Webmaster and the Web Company. As with the webmaster or web coordinator role, the Registration Coordinator might be a volunteer on the LOC, or a contractor, or some combination of the two.

DRM allows the LOC to define, schedule, and price registration types, social events, tutorials, and workshops. Certain registration types are required by the Societies and these are hard-coded into the tools. Additional types can be added if there is a need. These might include special registration status for members of other participating societies or for members of the press. DRM also provides for complimentary registrations, which might be used for VIPs or particular invited speakers.

The Societies require that the delegate registration fee structure for the conference observes certain constraints and DRM is written to meet these requirements. This delegate registration structure is summarized in Table 11, below. There is also an exhibitor registration structure, which is described in the next section.

Table 11 - Delegate Registration structure		
Registration Type <i>(Badge)</i>	Categories	Characteristics / Access
<p>Full Registration (Regular)</p> <p><i>Full Registration Badge</i></p>	<ul style="list-style-type: none"> • IEEE/MTS Member • Non-IEEE/MTS Member • IEEE/MTS Life Member 	<ul style="list-style-type: none"> • Full access to all Technical Sessions • Full access to the Exhibit • Tickets for all Included Events and option to purchase guest tickets • Option to purchase tickets for self and/or guests for Additional Events • Option to purchase tickets for Tutorials • Option to purchase tickets for Workshops (if any)
<p>Full Registration (Student)</p> <p><i>Full Registration Badge</i></p>	<ul style="list-style-type: none"> • IEEE/MTS Student Member • Non-IEEE/MTS Student 	<ul style="list-style-type: none"> • Full access to all Technical Sessions • Full access to the Exhibit • Option to purchase tickets for self (and guest) for Included Events • Option to purchase tickets for self and/or guests for Additional Events • Option to purchase tickets for Tutorials • Option to purchase tickets for Workshops (if any)
<p>Paper Registration</p> <p><i>Full Registration Badge</i></p>	<ul style="list-style-type: none"> • IEEE/MTS Member • Non-IEEE/MTS Member • IEEE/MTS Life Member <p><i>Payment of a Paper Registration fee by one of the authors is a requirement for inclusion of the paper in the Conference Proceedings</i></p>	<ul style="list-style-type: none"> • Full access to all Technical Sessions • Full access to the Exhibit • Tickets for all Included Events and option to purchase guest tickets • Option to purchase tickets for self and/or guests for Additional Events • Option to purchase tickets for Tutorials • Option to purchase tickets for Workshops (if any)
<p>One-Day Registration</p>	<ul style="list-style-type: none"> • IEEE/MTS Member • Non-IEEE/MTS Member • IEEE/MTS Student Member • Non-IEEE/MTS Student 	<ul style="list-style-type: none"> • Full access to all Technical Sessions for day of registration • Full access to the Exhibit for day of registration

<p><i>One-Day Registration Badge</i></p>	<ul style="list-style-type: none"> • IEEE/MTS Life Member 	<ul style="list-style-type: none"> • Option to purchase tickets for self (and guest) for Included Events (not restricted to day of registration) • Option to purchase tickets for self and/or guests for Additional Events (not restricted to day of registration) • Option to purchase tickets for Tutorials • Option to purchase tickets for Workshops (if any)
<p>Tutorials Only Registration <i>Tutorial Badge</i></p>	<ul style="list-style-type: none"> • IEEE/MTS Member • Non-IEEE/MTS Member • IEEE/MTS Student Member • Non-IEEE/MTS Student • IEEE/MTS Life Member 	<ul style="list-style-type: none"> • Purchased Tutorials only
<p>Workshops Only Registration <i>Workshop Badge</i></p>	<ul style="list-style-type: none"> • IEEE/MTS Member • Non-IEEE/MTS Member • IEEE/MTS Student Member • Non-IEEE/MTS Student • IEEE/MTS Life Member 	<ul style="list-style-type: none"> • Purchased Workshops only
<p>Exhibit Only Registration <i>Exhibit Only Badge</i></p>	<ul style="list-style-type: none"> • IEEE/MTS Member • Non-IEEE/MTS Member • IEEE/MTS Student Member • Non-IEEE/MTS Student 	<ul style="list-style-type: none"> • Exhibit only and only for the day of registration

Notes concerning the delegate registration structure:

- The **Characteristics** of a **Registration Type** apply to all **Categories** of that **Type**.
- The **Categories** of each **Registration Type** typically have different prices.
- The **Non-Member** rates for **Full Registrations** should be 75USD more than the **Member** rates to cover the discount given for Society Membership when a **Full Non-Member Registration** is purchased.
- **Included Events** such as the Gala, Icebreaker, Exhibitor Reception, and Awards Luncheons are included with a **Full Registration**. **Additional Events** such as city tours are not included.
- **Exhibit Only Registration** should be free and such attendees are welcome to additional **Exhibit Only Registrations** for additional days.
- **Additional Registration Types**, such as Press, can be added as needed using the Web Tools. All of the **Types** above are required and are automatically included.
- Additional **Registration Types** can be declared to be **Administrative** so that access to them is restricted. Press is typically of this **Type**.
- There is no student discount for **Paper Registration**.

The LOC shall work with the Societies while developing the conference budget to ensure that the registration fee structure meets these and other requirements. The RC will become familiar with these requirements during Web Tools training. Public announcements of registration costs need to accurately reflect the fee structure.

DRM allows the LOC to include questions for registrants on the public pages as necessary to support the requirements of particular venues. These may include, for example, queries for dietary or hotel preferences or needs. DRM generates reports supporting conference financial, catering, and tutorial management. Additional reports can be added to those already available on request of the LOC to the OCEANS Webmaster. DRM also prints delegate badges, receipts, social event tickets, and any other necessary tickets and coupons. The LOC is responsible for

providing suitable computers and printers.

DRM is fully integrated with the author database. Some coordination between the RC and the TPCC is normally required.

Finally, DRM includes a gateway for on-line credit card payments and an interface for defining and tracking other forms of payment. Changes to individual registrations can be made as necessary and DRM provides a history of the changes. The top level of the DRM administrative interface is shown in **Figure 6**.

The screenshot shows a web browser window with the URL <http://www.oceans07ieeeaberdeem.org/admin/registration/index.cfm>. The page title is "Registration Main Page". There are navigation links for "Registration Types", "Tutorials", "Social Events", "Misc. Questions", "Complimentary", "Export to Excel", "Reports", "Badges", and "Update Abstracts". Below these are search filters for "Last Name", "Payment Type", and "Payment Balance", along with date range selectors for "From" and "To". The main content is a table with 13 records.

1030 Records	Name	ID	Date	Type	Amount Due	Payment Type	Amount Paid
VIEW DELETE	HARVEY, Ian	2761	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	COPLAND, P	2759	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	CHEESMAN, Ed	2757	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	GEYS, Gary	2756	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	BRIDGLAND, James	2755	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	DOGGETT, Andy	2754	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	RUSSELL, Graeme	2752	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	RIDDOCH, Julia	2751	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	FORRESTER, Collean	2750	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	MILNE, Neil	2749	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	LANZNER, Helmut	2748	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	HALL, Per	2747	June 21, 2007	ONE-DAY: Exhibition Only Guest	20.00	Local Cheque: 20.00	20.00
VIEW DELETE	METAGGART, Rick	2746	June 21, 2007	ONE-DAY: Press	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	SMITH, Campbell	2745	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	WILKINSON, Bob	2744	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	McFARLANE, Michelle	2743	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	JEFFREY, Vanessa	2742	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	SMITH, David	2740	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	WILLOX, Brian	2739	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	PARK, Keith S	2738	June 21, 2007	ONE-DAY: Exhibition Only Guest	0.00	Telegraphic Transfer/BACS	0.00
VIEW DELETE	AL AWADEH, Timothy	2737	June 21, 2007	ONE-DAY: Non-IEEE Member	962.63	Credit Card: 962.63	962.63

Figure 6 - Top level DRM interface

Section 6 - ERM – Exhibitor Registration Module

The ERM is a browser based module providing an administrative interface and account based (pass code login) registration pages. The LOC shall include an Exhibit Chair (EC) who will oversee and manage this process and the Exhibit. The EC should be familiar with both financial matters and with OCEANS Conferences. The EC will work with the Financial Chair as well as with the OCEANS Webmaster and the Web Company. Similar to the webmaster or web coordinator positions, the Exhibit Chair might either perform the work or might oversee a contractor performing the work.

Contracts and booth arrangements are negotiated off-line. The contract forms can be available for download from the website. Payments are made off-line as well. As part of the negotiations the EC should collect basic contact information for a person who will serve as the primary point of contact (POC) for the purchaser of each booth or group of booths. This will not necessarily be somebody who attends the conference or exhibition. Multiple booths, shared booths, agents representing one or more companies, companies with several divisions, patron booths, and

complimentary booths (for the Societies and for future OCEANS) are all possibilities.

In addition to the POC information, the negotiation should determine the allowed Total Staff, which is the sum of the Full-Delegate Staff and the Exhibit-Only Staff for that particular contract. Although the number varies, it is typical for each booth purchase to include one Full Registration (one Full-Delegate Staff). Full-Delegate Staff have unrestricted access to the Technical Sessions, the Exhibit, and the Social Events. Appropriate badges and tickets are generated through DRM, the Delegate Registration Module. It is important to note that this Full-Delegate Staff registration is not a Paper Registration and it may not be used to qualify a paper for inclusion in the Technical Program.

Exhibit-Only Staff have access to the Exhibit, but not to other portions of the conference unless they purchase a registration or social event guest tickets. They may be the guest(s) of Full-Delegate Staff people. An exception is the Exhibitor Reception. Tickets and beverage coupons are automatically generated by ERM for all Exhibit-Only Staff.

Once a contract is settled, the administrative side of the ERM is used to create an account for that contract. Using the interface, the POC and other company information are entered and an email with login information is sent to the POC. It is the responsibility of the POC to provide all further information. This includes names and contact information for all staff members, designating which are to be Full-Delegate Staff. ERM restricts the number of each Staff type based on the values entered by the EC for that contract. It is the responsibility of the EC to follow-up with each POC to make sure they received the email and followed the instructions in a timely fashion.

The exhibitor database that is generated in this process can be manipulated and queried using the administrative tools. ERM and DRM are integrated. In particular, Full-Delegate Staff registrations become part of the DRM database shortly before the conference. Before that time the POC is free to login and alter the names and designations of Exhibitor Staff.

Similar to DRM, ERM provides on-line and exported staffing reports to support conference operations such as catering. Similar to TPM, ERM provides an export that can be used by the LOC in assembling the Conference Program document.

Table 12 - Registration Structure for Exhibitors	
Registration Type <i>(Badge)</i>	Characteristics / Access
Exhibitor: Full-Delegate Staff <i>Full Registration Badge</i>	<ul style="list-style-type: none"> • Full access to all Technical Sessions • Full access to the Exhibit • Tickets for all Included Events and option to purchase guest tickets • Option to purchase tickets for self and/or guests for Additional Events • Option to purchase tickets for Tutorials • Option to purchase tickets for Workshops (if any) <p><i>Full Registrations associated with the purchase of a booth in the Exhibit may not be used as a Paper Registration. An independent Paper Registration is required for inclusion of a paper in the Conference Proceedings.</i></p>
Exhibitor: Exhibit-Only Staff <i>Exhibitor Badge</i>	<ul style="list-style-type: none"> • Exhibit only

Section 7 - Web Tools Training

A web tools training session is conducted by the OCEANS Webmaster and the Web Company at each OCEANS Conference. The conference webmaster is strongly encouraged to attend such a training session one to two years in advance of the conference. The Technical Program Committee Chair and the Registration Chair are required to attend such a training session one to two years in advance of the conference.

Section 8 - Web Tools Costs

The total cost for the three modules of the web tools and generation of the master Proceedings CD is approximately \$6000 (USD). The cost of the master Proceedings CD depends on the number of papers. Additional support from the Web Company, when needed, is billed at \$55/hour. A \$12,000 line item should be included in the conference budget in anticipation of these costs.

Section 9 - Naming Convention and Website URLs

The Societies have adopted a naming convention for the OCEANS Conferences. The name of each OCEANS Conference, which must be used in all promotional and informational material and communications, should follow this pattern:

- OCEANS 'YY SPONSOR(S) City

Examples are:

- OCEANS '07 IEEE Aberdeen
- OCEANS '07 MTS/IEEE Vancouver

The order in which the parts of the name appear should be as shown. OCEANS should always appear in uppercase letters. The inclusion of the sponsor(s) and the city in the name are required in all instances. *There are two OCEANS Conferences each year, so referring to one as "OCEANS 'XX" or "OCEANS YYYY" is confusing and should be avoided.*

The URLs used for OCEANS Conference websites reflect the naming convention. These URLs are registered, hosted, and paid for by the Societies. However, the content is developed by the individual LOCs using the web tools. LOCs shall not secure or employ other URLs. The URLs follow this pattern:

- <http://www.oceansYYsponsorscity.org>

Examples are:

- <http://www.oceans07ieeeaberdeem.org>
- <http://www.oceans07mtsieeevancouver.org>

Secondary URLs using a 4-digit year are maintained to reduce confusion. These secondary URLs point to the 2-digit year sites.

Section 10 - Umbrella Websites

The Societies maintain umbrella sites with links to OCEANS Conference websites. The primary site is:

- <http://www.oceansconference.org>

This site contains links and conference dates for all OCEANS Conferences. Similar pages that are year specific contain links to the two OCEANS Conferences for that year. Examples are:

- <http://www.oceans07.org>
- <http://www.oceans2007.org>

The individual thumbnail images, themes, and dates for each listed OCEANS Conference must be supplied by the LOC.

Chapter VII - Finances

The LOC will include a Finance Chair. The Finance Chair should be a person familiar with accounting processes and financial report preparation as well as skillful at finding their way around an Excel spreadsheet.

IEEE/OES and MTS shall jointly finance the Conference by providing equal advance funds. The amount and schedule for advance money payments shall be indicated in the Conference Plan and budget. All funding shall be documented and entered into the Conference accounting record. All financial grants shall also be included in the Conference financial records. OES and MTS shall share the net surplus or loss from the Conference accounting record on an equal basis.

Sharing of surplus/loss with local or regional entities of IEEE and MTS shall be arranged independently by each Society with its associated participating entities.

Interim financial reports shall be made at least quarterly to MTS and OES to keep the sponsors cognizant of the financial condition of the conference. This should be done using the standard OCEANS Conference electronic spreadsheet, which shall be obtained from JOAB.

The IEEE conference management department has developed an excellent series of financial guidelines to assist conference organizers. The Finance Chair is encouraged to familiarize themselves with these guidelines and adopt those that are practical to an OCEANS event.

The reader is cautioned that these guidelines are specific to IEEE events. As an example, IEEE references to naming conventions for bank accounts should be ignored.

These guidelines can be found at the following URL:

<http://www.ieee.org/web/conferences/organizers/financial.html>

Section 1 - Budget

A Finance Chair and designated assistants shall prepare a Conference Budget showing income, expense, surplus, cash flow, and the extent of advance funds required. It should be categorized by the Committee to permit various Conference elements and activities to be monitored and controlled. The selected local group shall submit a Conference Budget as part of the Conference Plan outlining anticipated expenditures and income. This budget must show projected income that is at least 120% of projected expenses. Once approved, the budget shall serve as the limitation to spending authority within an overall constraint of 10%. The expenditures by budget line item will be reviewed periodically by JOAB. Budget revisions, if appropriate, must be approved by the Societies' Treasurers.

Section 2 - Bank account

An appropriate bank account shall be established by the LOC. Authority to disburse funds shall be limited to the Conference General Chair, the Conference Finance Chair, and such members of both Societies as they shall designate. Such persons shall be bonded.

There should be at least one OES and one MTS (when the conference is co-sponsored by MTS) executive as a signing authority on the account(s) in addition to local organizing committee members that are signatories in case of emergency. Additionally, there should be a minimum of two persons required to sign checks to ensure there is concurrence on expenses being paid.

It is noted that IEEE offers a conference banking service called "Concentration Banking". This service harvests excess cash from the local account and puts it into an account providing higher

interest. Liaison between the local committee and IEEE in Piscataway, N.J. keeps the necessary cash available. Nevertheless this service is US based only.

Section 3 - Audit

An Audit firm shall be contracted with to complete a final audit, consistent with accounting practice of the income and expenditures of the Conference no later than 6 months after the last day of the conference. No member of the Audit group shall have authority to disburse Conference funds.

The following list of documents must be retained and forwarded to the auditor at the end of the conference.

- All contracts and agreements between the conference and supporting societies
- All contracts, agreements and/or quotations between the conference and suppliers including but not limited to the hotels, conference centre, audio visual suppliers, food and beverage, PCO(s) and entertainers
- All original invoices or other supporting documents paid with a copy of the check produced to pay it attached
- All bank statements with cancelled checks attached if so provided by the bank
- A copy of the final program for the conference
- All original exhibitor agreements
- All original patronship agreements
- Delegate registration supporting documentation (should be provided by the PCO) or from Webtools
- Conference Plan, including Conference budget
- Grant agreement(s), if any, including any amendments
- List of conference committee members and position on committee
- Summary of Conference Manager's (CMS) accounting records (i.e. receipts and disbursements)
- If Treasurer's/Finance Chair's accounting records (i.e. receipts journal and disbursement journal) are maintained on an Excel spreadsheet, please provide an electronic copy

Section 4 - Insurances

Insurance and bonding shall be provided for the Conference and shall meet the minimum coverage required by each Society. Existing Society insurance policies shall be used as insurance coverage for the event. In any case, a conference insurance that covers failures to meet goals is mandatory.

Section 3 - Registration Fee Structure

Registration fees are determined during budget preparation. In addition to being consistent with the fees of previous OCEANS Conferences and meeting budgetary requirements, such fees should adhere to the criteria laid out below:

Registration fees for members of the two sponsoring societies should be lower than those for non-members. Participating societies may be selected to help advertise the Conference in their publications, with their members allowed to register for the Conference at member rates.

The LOC must decide in advance which invited guests or speakers, if any, will be given complementary registration and accommodations. Complementary registration should not be given to paper presenters and session chairs.

A significant registration discount should be provided to students to attend technical sessions and the exhibits. Such reduced registration does not include any social functions, but does include the Proceedings. Registration as a student should be granted only to those who can prove they are enrolled in a degree program at an accredited institution and are currently taking a full course load toward the degree.

Life (IEEE) and Emeritus (MTS) members should also be offered reduced registration.

Key LOC members may be offered complementary registration and lodging, as deemed appropriate.

The Presidents of each Society should receive complementary conference registrations and hotel accommodations.

The complete delegate and exhibitor registration fee structures are detailed in table Table 11 - Delegate Registration structure, on page 52 and Table 12 - Registration Structure for Exhibitors on page 55.

Section 4 - Proceedings Credit Offer from IEEE

IEEE offers a credit payable to the conference for each final paper submitted to the conference. In the case of co-sponsored events with MTS the credit is 50%. Application for this credit can be submitted at: <http://ta.ieee.org/InfoSched/Pub/Search.aspx>

Section 5 - Membership Drive Rebate

Non-member full conference registration fees are to be at least \$75 greater than society member (OES and MTS) registration fees. \$75 is then returned to each society for each new member they sign up at the conference. This rebate will form part of the final disbursement calculations to each society. A voucher offering free membership sign up to either OES or MTS (but not both) must be included in the delegate registration package for full non-member registrants.

Section 6 - Hotel Complimentary Nights

Typically, hotels offer complimentary rooms nights based on the number of nights booked for the conference (i.e. one complimentary night for 50 hotel nights). The Finance Chair, along with the Local Arrangements Chair, should be aware of this and be sure these complimentary nights are allocated to Conference dignitaries, special guests or LOC if appropriate. Some likely candidates to be offered these complimentary nights would be keynote speakers, society Presidents and LOC Chairs.

Section 7 - Tax rebates

Some jurisdictions offer a rebate of local taxes paid on what may be deemed a foreign conference. The Finance Chair is responsible for investigating any local jurisdiction rebates that may be available and submitting claims for such refunds promptly after the conference close.

Section 8 - Final Financial Reporting Deadline

The Finance Chair is responsible for providing any and all final financial reports to both OES and MTS (where applicable) as soon as possible after the close of the conference but in no case shall they be submitted later than 1 year following the last day of the conference.

Chapter VIII - Local Arrangements

This chapter describes the local arrangements for the conference. These include the contacts with the hotels, rooms, meals and social events, conference facilities, field trips, tours, local transportation, and related items. The arrangements have an important effect on the attendees since these are often the most lasting impressions left by the Conference.

All activities planned and carried out by the LOC shall have a jointly sponsored image. Arrangements shall be sufficiently planned to provide an orderly and pleasant experience for the attendees. However, excessively lavish and costly arrangements shall be avoided.

Section 1 - Hotel and conference center facilities

Candidate hotel(s) and conference facilities will be proposed by the selected local group in the Proposal. RECON will perform an on site appraisal of the hotel and conference facilities. The Societies' contracted PCO shall negotiate the contracts taking into account standing IEEE contracts with major hotel chains. Final selections of hotel and conference facilities are the responsibility of RECON, JOAB, and the Societies with input from the selected local group and the PCO. The hotel and conference facilities contracts are subject to review by IEEE and must be signed by the Presidents of both MTS and OES.

The contract(s) must address room rates, room-night blocks including guaranteed minimums and adjustment dates if applicable, catering arrangements if applicable, technical program and plenary meeting rooms and halls, exhibit space and halls, special meeting rooms, and such other facility needs as shall apply. Furthermore, the contract should address complimentary hotel rooms and meeting rooms.

The selection and allocation of the meeting rooms for the technical sessions, tutorials, and Student Posters shall be coordinated with the TPC. JOAB will provide information about attendance at similar events during past OCEANS Conferences.

The appropriate aids for presenting the paper (laptops, LCD projectors, etc.) need to be provided. Typically these are rented from a service that will provide standby and back-up equipment. Attendance, including the presenting authors, should be taken at each session to aid in projections for future Conferences.

Signs and directions shall be provided in prominent locations at the hotel and throughout the conference facilities.

Adequate security arrangements shall be provided, particularly in the registration area where money will be handled and in the exhibit area where valuable equipment will be on display. The exhibit area security arrangements must be in effect 24 hours per day between set-up and takedown.

The Arrangements Committee shall establish a medical emergency contingency plan, with hotel and conference facility staff(s), in anticipation of possible need.

Section 2 - On site arrangements

One of the largest items in the budget is the meals, including luncheons, coffee breaks, and social functions. It is also an area of high financial risk, because it is difficult to accurately predict the number of people that will attend such events. The hotels and conference centers will generally work with the Committee and may allow an increase over the guarantee in the number of attendees at the event. It is desirable to have an advisor in charge of these arrangements who has previous experience in dealing with hotel personnel in meal functions. Not all individuals

who purchase tickets to attend meal functions actually attend. The general rule is to take 70 to 80 per cent of the tickets sold as the number of meals to guarantee. This rule should be applied to all ticketed events.

The meal services typically consist of arrangements for speakers' breakfasts, one ice-breaker, Exhibitors Reception, two society awards luncheons, one box lunch and one banquet. Spending and liability at cocktail parties must be carefully controlled. Control may be exercised through the use of drink tickets.

Each Society presents awards as part of the Conference. Each awards luncheon takes about seventy to ninety minutes. Because of the length of each luncheon, separate luncheons are held. These Awards Luncheons are usually held on Tuesday and Wednesday of the conference with the order alternating year-to-year between the societies.

Other special events may be arranged such as cocktail parties, special dinners for groups, such as the MTS and OES administrative councils. The Societies will be responsible for the cost associated for their individual meetings. The cost for joint meetings will be shared. These costs will be billed to each Society after the Conference for reimbursement to the Conference.

Section 3 - Registration Arrangements

The web-based registration process, both advance and on-site, and including payment, badges and collection of and access to statistical information is handled on-line using the web tools developed by the Societies. The LOC is responsible for providing on-site personnel, computers, printers, internet connectivity, and facilities for registration. The LOC is also responsible for providing and distributing registration material to the delegates.

Some cities have tourist bureaus or convention managers that will provide personnel at no – or reduced - cost to staff registration booths. Wherever possible, such assistance should be welcomed, but reviewed by the Arrangements Chair to ensure that the expected performance will be reliably provided; cash may be handled in the registration area. At least one member of the LOC should be present at all times. Assistance on how to handle registration is available from JOAB. PCO support is also available.

Section 4 - Special items

Major air carriers and car rental firms should be contacted to determine if discount travel arrangements can be made for attendees. Transportation arrangements from the airports to the hotels and for Conference functions are to be determined and should be provided in advance Conference literature.

Special transportation may be arranged for Conference VIP's, field trips, and tours. MTS and OES offices should be contacted regarding insurance coverage for these events. In most cases the societies insurance will cover these functions as part of the Conference.

Included in each registration package and each exhibition package shall be a survey form to solicit information on attendee satisfaction and other data as determined by the sponsoring societies. The survey question fields will be obtained from the sponsoring Society liaison members.

A voucher must be included in the registration package that will allow non-members to subscribe on-site to one or the other societies. The voucher should read:

"Non-Member Full registration includes a xx US\$ (or local currency) credit towards a one year (20xx) trial membership in IEEE/OES or MTS. Please apply directly at either the OES or MTS booths at the conference." The voucher edition is now included with the Web tool facilities.

Chapter IX - Promotion

Section 1 - Publication

Since the emergence of the all electronic format of the conferences, the publication part of the conference has been minimal. The main stream of information is through the Website. Nevertheless, some information is still distributed in paper form, including publicity ads. The following publications should be produced:

- A conference announcement (preview flyer) including Call for Paper Proposal, Exhibit information, Student Program, contacts, Website URL, ...
- Final program (including an exhibitor's program)
- Final report

Section 2 - Publicity

This is a very important function of the Conference. Historically less than 20% of the attendees are members of either MTS or OES; hence, publicity that reaches non-members is especially important. People active in Government or Industry Public Affairs, Public Relations, Press and ocean magazines should be solicited to assist in a Publicity Campaign.

The Publicity Committee is responsible for planning and executing a publicity campaign and preparing press releases and press kits, and manning the press room at the Conference.

The effectiveness of different types of publicity has not been fully assessed and therefore the judgment of those experienced in publicity, advertising, or public affairs should be solicited. Ocean magazines prefer to exchange publicity costs for exhibit space, and this should be encouraged. One of the best ways of publicizing the Conference is through direct mailing or e-mailing of the conference links to as many ocean-oriented professionals as is reasonably possible. Posters and flyers should be available at pertinent conferences.

Table 13 - Publicity Planning Schedule

time	action	coordination
- 24 months	ask magazines to place notice of Conference in Calendar of Events	
- 24 months	prepare and publish Conference announcement for distribution at preceding conferences	
-24 to -18 months	Develop web site layout and open web site	web master
- 12 months	prepare advertisements to appear in selected magazines	
- 12 to -4 months	place advertisements in selected magazines <i>possibly in exchange for exhibit space</i>	

Table 13 - Publicity Planning Schedule		
- 6	prepare articles on Conference for publication in selected magazines	
- 4 months	ask magazines to place articles in issues immediately before Conference <i>possibly in exchange for exhibit space</i>	
- 3 months	begin preparing Conference Program (for distribution with registration package)	with LOC, Exhibits Com. and TPC
- 2 months	arrange for printing of Conference Program	with PCO
-2 to -1	obtain the technical program and insert into conference program	with TPC
-2 to -1	obtain the exhibit program and insert into conference program	with EC
- 1 month	prepare articles on Conference to appear in local/regional newspapers	
- 1 month	finalize Conference Program and send to printer and web services provider	with TPC, Exhibits Com, and PCO
- 2 weeks	arrange for articles on Conference to appear in local/regional newspapers	with PCO
- 1 week	place Conference Program in registration package	with PCO

Appendix I - Abstracts and Papers on-line

Section 1 - Abstracts on-line management

The abstracts are visible by batch of 20. Each abstract can be edited along with the author's references. Different fields are accessible allowing viewing the abstract ranking, assigning a status (accepted, rejected, or withdrawn), assigning a final topic (in the final paper phase), etc...

The TPCC has the ability to input a reviewer with one or more area of expertise to which abstracts will be linked. The reviewer will be granted an access via login/password and enabled to download the abstracts in his/her field. The reviewer has to rank the abstracts in the range 1-4 (with the option "not my area" if the abstract was assigned incorrectly) as described in chapter II – Section 3.

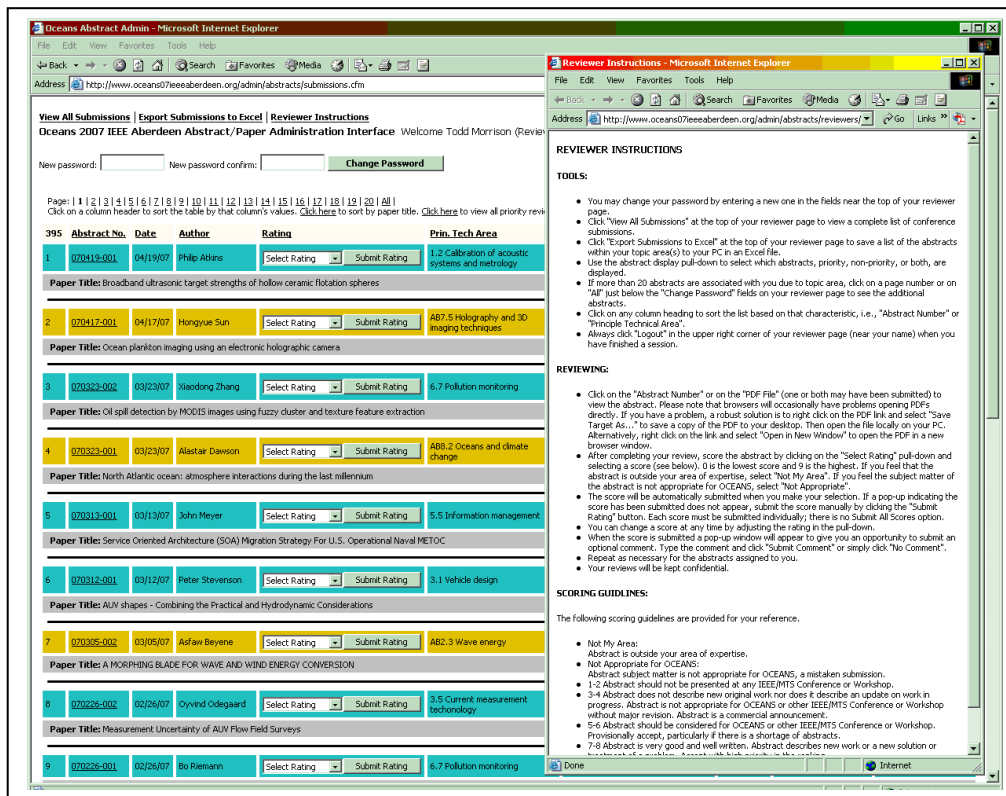


Figure 7 - This screen shows an example of the reviewer info.

The author's profile can be edited individually. A list of authors is available with markers indicating if they have accessed or not their personal data once the abstract has been accepted (this means that they should have read the instructions).

Sort by Email Confirmation. | [Go to Session Chairs](#) | [Click here to convert list to Excel.](#)

	First Name	Last Name	Organization	Email	No. Abstract	Abs. Statuses	Upload Complete?
[edit]	Ron	Ableah	JOmegaK	ableah@OmegaK.com	1 (3)	A	Yes
[edit]	Nadib	Achr	University of Paris 13 - LZTI	nadib.achr@lzt1.univ-paris13.fr	1 (3)	A	Yes
[edit]	Morgan	Adams	Robert Gordon University, Aberdeen	m.adams@rgu.ac.uk	1 (1)	A	Yes
[edit]	Ali	Alammas	Dhofar university	haleeb@hotmail.com	1 (0)	R	No
[edit]	Thamer	Al-rashidi	National Oceanography Centre, Southampton	thamer22@noc.soton.ac.uk	1 (1)	A	Yes
[edit]	Edmary	Altamiranda	Velco Gray	edmary.altamiranda@velco.com	1 (1)	A	Yes
[edit]	Lars	Andersen	Sinrad AS	lars.nonboe-andersen@sinrad.com	1 (1)	A	Yes
[edit]	Piehl	Harms	University of Bergen	andrea.piehl@uio.no	2 (1)	A, S	Yes
[edit]	Chiharu	Aoyama	Japan Independent Institute Co.,Ltd	soyamac@doken.co.jp	2 (0)	S, W	No
[edit]	Yessy	Arvelyna	Tokyo University of Marine Science and Technology	yessy_ar@kaiyodai.ac.jp	1 (1)	A	Yes
[edit]	Akira	Asada	University of Tokyo, Institute of Industrial Science	asada@is.u-tokyo.ac.jp	2 (1, 1)	A, A	Yes
[edit]	Said	Assous	British Geological Survey	sasso@bgs.ac.uk	1 (1)	A	Yes
[edit]	Teza	Atashkhouei	Engineering Research Institute of Agricultural Ministry	atashkho@yahoo.com	1 (0)	R	No
[edit]	Philo	Atkins	University of Birmingham	p.r.atkins@bham.ac.uk	1 (1)	A	Yes
[edit]	Raif	Bachmayer	National Research Council Canada	Raif.Bachmayer@nrc.ca	1 (0)	W	No
[edit]	Mohsen	Badley	University of Delaware, College of Marine and Earth Studies	badley@udel.edu	1 (3)	A	Yes
[edit]	Mohammad	Badran	University of Jordan Yarmouk, Marine Science Station	mbadran@yu.edu.jo	1 (0)	W	No
[edit]	Philip	Bagley	University of Aberdeen, Oceanlab	p.bagley@abdn.ac.uk	1 (1)	A	Yes
[edit]	Helen	Bailey	University of Edinburgh, Institute for Energy Systems	helen.bailey@ed.ac.uk	1 (1)	A	Yes
[edit]	Christopher	Balfour	Proudman Oceanographic Laboratory	cbal@pol.ac.uk	1 (1)	A	Yes
[edit]	Madalna	Barbu	University of New Orleans	mbarbu@uno.edu	1 (0)	W	No
[edit]	Amos	Barka	OLRAC	amos@olrac.com	1 (1)	A	Yes
[edit]	Carlos	Barrera	Instituto Canario de Ciencias Marinas	carlos@iccm.ccanaria.es	1 (2)	A	Yes
[edit]	Levent	Bat	Sinop Fisheries Faculty	levenbt@omu.edu.tr	1 (1)	A	Yes
[edit]	Pierre-Philippe	Beaujean	Florida Atlantic University	pbeauje@seatech.fau.edu	1 (1)	A	Yes
[edit]	Charlotte	Beels	Ghent University	Charlotte.Beels@UGent.be	1 (1)	A	Yes
[edit]	Judith	Bell	Heriot Watt University	j.bell@hw.ac.uk	1 (1)	A	Yes
[edit]	Mohamed	Benbouzd	University of Western Brittany	m.benbouzd@ieee.org	1 (3)	A	Yes
[edit]	Markus	Berg	University of Southampton	markus.berg@南安普顿.ac.uk	1 (1)	A	Yes

Figure 8 - This screen shows how the information is displayed on the management Web site.

Section 2 - Acceptance / Rejection Process

The next two pages present examples of automatic e-mails sent to the authors for abstract acceptance/rejection.

Dear **HONORIFIC FIRST_NAME LAST_NAME**,

I/WE AM/ARE pleased to inform you that your abstract, **#ABSTRACT_NUMBER, ABSTRACT_TITLE_IN_BOLD**, has been accepted for inclusion in the **CONFERENCE_NAME** Technical Program. In order to complete the acceptance process, please login to your personal account at the manuscript upload site. Logging in will register your receipt of this acceptance message.

To reach the upload site you may either point your browser to the coded link below:

[CODED LINK](#)

or

Point your browser to [CONFERENCE_WEBSITE/admin/abstracts](#) and log in using the following email address and password:

Email: [AUTHOR_EMAIL](#)

Password: **AUTHOR_PASSWORD**

Please note that some email programs, possibly yours, may mistranslate characters in the URL given above. There should be periods (full stops) in the URL after "www" and also before "org". If you see odd characters, such as "=2E", in place of the periods (full stops), cut-and-paste the URL into your browser, replace the odd characters with periods (full stops), and then follow and bookmark the link for future use. The same editing step may be required for your email address. Similar modifications may be required for the coded link.

When you log in, a list of your accepted abstracts will be displayed. A link next to each paper title will allow you to verify and edit contact information. This is the site you will use when you are ready to upload your completed paper(s), so please keep the login information provided above where you can find it again. Be sure to log out when you are done.

After you have registered your acceptance with your initial login, please visit the Author Information Page on the conference web site, [CONFERENCE_WEBSITE](#). The Author's Kit and further instructions to authors will be available there. The Author Information Page also includes instructions and links to IEEE PDF eXpress. All papers must be IEEE PDF eXpress compliant to be included in the Conference Proceedings, so please be sure to complete this process before you upload your final paper.

The deadline for final paper submission is **SUBMISSION_DEADLINE_DATE**. This deadline will not be extended. If you foresee any difficulty, please contact the Technical Program Chair(s), **TECHNICAL_PROGRAM_CHAIR(S)**, at [TECHNICAL_PROGRAM_CHAIR\(S\)_EMAIL](#). **I/WE** appreciate your cooperation and look forward to receiving your final paper.

Please note that your paper will only be included in the Technical Program and Conference Proceedings if at least one of the authors registers and pays a full registration fee by **AUTHOR_REGISTRATION_DEADLINE_DATE**. This deadline will not be extended. A single author can be the registrant for no more than three papers. Independent of registering for the conference, oral presentation of your paper at the conference by one of the authors is a requirement for inclusion in the Conference Proceedings and distribution to IEEE Xplore, the on-line database.

Finally, **I/WE** would like to encourage you to participate in future OCEANS Conference. A schedule of upcoming meetings can be found at <http://www.oceansconference.org>.

I/WE look forward to seeing you at **CONFERENCE_NAME**.

Sincerely,

TECHNICAL_PROGRAM_CHAIR(S)

Technical Program Committee Chair(s)

CONFERENCE_NAME

[TECHNICAL_PROGRAM_CHAIR\(S\)_EMAIL](#)

[CONFERENCE_WEBSITE](#)

Dear **HONORIFIC FIRST_NAME LAST_NAME**

I/WE regret to inform you that we were unable to accept your abstract, **#ABSTRACT_NUMBER, ABSTRACT_TITLE_IN_BOLD,** for inclusion in the **CONFERENCE_NAME** Technical Program. Reasons for which abstracts were not accepted by the Technical Program Committee include, but are not limited to, limited space in the technical program, excessive commercial content, insufficient information for accurate review, dated material, and content outside the scope of an OCEANS Conference..

I/WE encourage you to modify your abstract for submission to a future OCEANS Conference. A schedule of upcoming meetings can be found at <http://www.oceansconference.org>.

I/WE greatly appreciate your submission and hope that you still plan to participate in **CONFERENCE_NAME**.

Sincerely,

TECHNICAL_PROGRAM_CHAIR(S)

Technical Program Committee Chair(s)

CONFERENCE_NAME

[TECHNICAL_PROGRAM_CHAIR\(S\)_EMAIL](#)

[CONFERENCE_WEBSITE](#)

Section 3 - Paper upload / PDF eXpress requirements

The authors are required by IEEE to have their papers PDF compliant through the IEEE site, so-called PDF eXpress. The main purpose is to enable them to post all the papers on their Xplore database and to certify all viewers that the paper can be downloaded and read with Acrobat reader.

The complete process is not entirely settled yet between IEEE and the OCEANS conferences, due to the fact that the authors have two different logins and passwords to manage. A full description can be found in Appendix III -

Section 4 - Session Management

This tool is one of the most important among those developed. The first step consists of defining a list of sessions and of time-slots. Typically, there are about 8 to 12 parallel sessions and 4 possible time-slots per day in a two and a half day span. Each session is made of 4 to 5 papers. This results in between 80 to 120 sessions and therefore, between 360 to 540 papers if all the slots are filled.

The session naming action triggers a so-called “final topic assignment” for each author to be entered by the TPCC. The associated session bins are then pre-filled accordingly. Of course, a final topic is not limited to 4/5 papers, meaning that the author’s papers have to be sorted and organized by the TPCC.

The screenshot shows a web browser window titled "Session Grid - Microsoft Internet Explorer". The address bar shows a URL from the IEEE website. The main content is a grid with columns for days and time slots, and rows for sessions. Each session cell contains a "define session" button and a list of papers with authors and titles. The grid is color-coded by session chair, with colors like blue, green, and red. The papers listed include titles like "A MULTIPHASE PROTOCOL FOR...", "TIME REVERSAL MEMO ABSTRACT...", "ON THE DESIGN OF UNDERWATER AC...", "ROUTING CRITERIA FOR...", "COMPREHENSIVE DESIGN TOOL FOR...", "MODELING AND CONTROL OF A...", "NEW DEVELOPED SERVICES FOR...", "THE USE OF COMPUTATIONAL...", "EVALUATION RESULT OF NEW SEAF...", "SEDIMENT SAMPLING AT A...", "ULTRA...", "COMBINING THE...", "SOFTWARE MODELS FOR UNDERWATER...", "HIGH-FREQUENCY COHERENT COMMUNICAT...", "A MULTI-CHANNEL MAC PROTOCOL...", "A ROBUST CONTROL ALGORITHM FOR...", "POSITIONING METHOD FOR SURFACE...", "ACOUSTIC WAVE PROPAGATION IN...", "EXAMINING THE VALIDITY OF A...", "HIGH-FREQUENCY ACOUSTIC PROPAGATION...", "ACOUSTIC WAVE PROPAGATION IN...", "ACOUSTIC WAVE PROPAGATION IN...".

Figure 9 - This screen exemplifies the use of the grid tool

The color coding (red, green, ...) implies that some warnings are necessary to avoid setting one paper in more than one time-slot or the same author (with different papers) or a session chair in two different sessions at the same time-slot. The session grid is exportable as an Excel or

HTML file.

The grid triggers the creation of the final list of papers in a friendly-user format, enabling the final program to be set up. The Conference CD – not the final Proceedings – is then ready to be distributed.

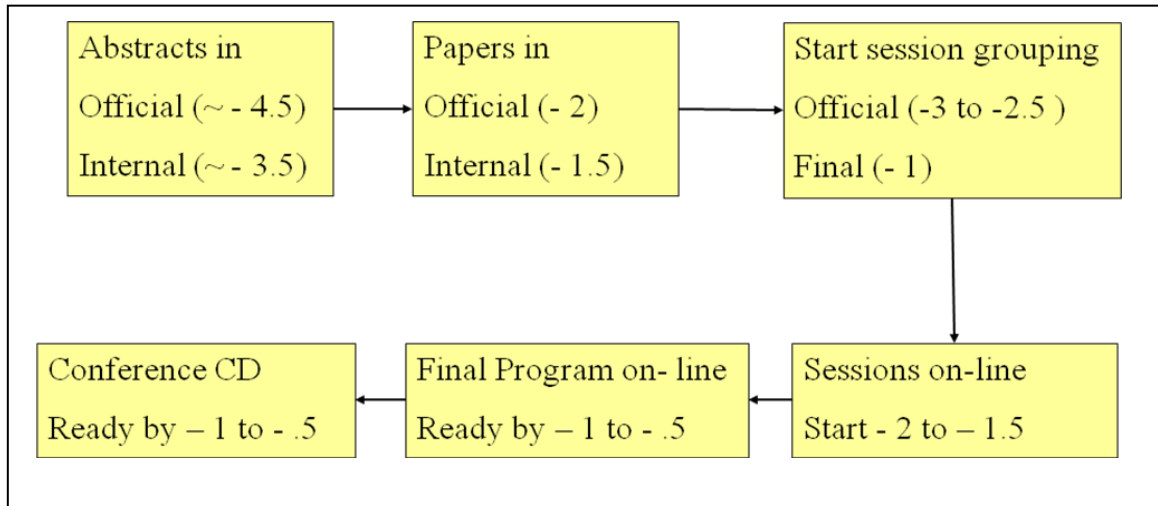


Chart 3 – Example of flowchart for the end-to-end abstract to CD process.

Appendix II - TOPIC AND SUB-TOPIC LIST

The topic list is made of 1 local topic linked to the Conference theme and 10 topics summarizing the technical interests of the societies and as exemplified by the OES technical and MTS professional committees. The sub-topics should cover as exhaustively as possible all the fields addressed by the societies.

OCEANS 'XX Venue - Topics and Themes

Venue.0.xx – Theme

OCEANS 'XX Venue – OCEANS Conference Core Topics

1.0 UNDERWATER ACOUSTICS AND ACOUSTICAL OCEANOGRAPHY

- 1.1 Sonar and transducers
- 1.2 Calibration of acoustic systems and metrology
- 1.3 Sound propagation and scattering
- 1.4 Acoustical oceanography
- 1.5 Geoacoustic inversion
- 1.6 Bioacoustics
- 1.7 Seismo-acoustics
- 1.8 Ocean noise
- 1.9 Signal coherence and fluctuation

2.0 SONAR SIGNAL / IMAGE PROCESSING AND COMMUNICATION

- 2.1 Sonar signal processing
- 2.2 Array signal processing and array design
- 2.3 Model-based signal processing techniques
- 2.4 Vector sensor processing
- 2.5 Synthetic aperture (active and passive)
- 2.6 Classification and pattern recognition (parametric and non-parametric)
- 2.7 Sonar imaging
- 2.8 Acoustic telemetry and communication
- 2.9 Biologically inspired processing

3.0 OCEAN OBSERVING PLATFORMS, SYSTEMS, AND INSTRUMENTATION

- 3.1 Automatic control
- 3.2 Current measurement technology
- 3.3 Oceanographic instrumentation and sensors
- 3.4 Systems and observatories
- 3.5 Buoy technology
- 3.6 Cables and connectors

3.7 Marine geodetic information systems

4.0 REMOTE SENSING

4.1 Air / sea interaction

4.2 Lidar

4.3 Passive observing sensors

4.4 Coastal radars

4.5 Ocean color and hyperspectral measurements

4.6 Airborne and satellite radar and SAR

4.7 Operational observation

4.8 Sensor synergy

4.9 Space systems

5.0 OCEAN DATA VISUALIZATION, MODELING, AND INFORMATION MANAGEMENT

5.1 Access, custody, and retrieval of data

5.2 Data visualization

5.3 Numerical modeling and simulation

5.4 Marine GIS and data fusion

5.5 Information management

5.6 Data assimilation

6.0 MARINE ENVIRONMENT, OCEANOGRAPHY, AND METEOROLOGY

6.1 Oceanography: physical, geological, chemical, biological

6.2 Marine geology and geophysics

6.3 Hydrography / seafloor mapping / geodesy

6.4 Hydrodynamics

6.5 Marine life and ecosystems

6.6 Meteorology

6.7 Pollution monitoring

6.8 Mineral resources

7.0 OPTICS, IMAGING, VISION, AND E-M SYSTEMS

7.1 Imaging and vision

7.2 Beam propagation

7.3 Optical sensors and adaptive optics

7.4 Marine optics technology and instrumentation

7.5 Holography and 3D imaging

7.6 Optical communication

7.7 E-M sensing

8.0 MARINE LAW, POLICY, MANAGEMENT, AND EDUCATION

8.1 Coastal zone management

8.2 Ocean economic potential

- 8.3 Marine law and policy
- 8.4 International issues
- 8.5 Marine safety and security
- 8.6 Law of the Sea and UNCLOS
- 8.7 Ocean resources
- 8.8 Marine education and outreach
- 8.9 Ocean economic potential
- 8.10 Marine archaeology

9.0 OFFSHORE STRUCTURES AND TECHNOLOGY

- 9.1 Ocean energy
- 9.2 Ropes and tension members
- 9.3 Offshore structures
- 9.4 Marine materials science
- 9.5 Marine salvage
- 9.6 Diving
- 9.7 Pollution clean-up and pollution remediation
- 9.8 Deepwater development technology
- 9.9 Seafloor engineering
- 9.10 Ocean exploration

10.0 OCEAN VEHICLES AND FLOATING STRUCTURES

- 10.1 Vehicle design
- 10.2 Vehicle navigation
- 10.3 Vehicle performance
- 10.4 Autonomous underwater vehicles
- 10.5 Manned underwater vehicles
- 10.6 Remotely operated vehicles
- 10.7 Dynamic positioning
- 10.8 Moorings, rigging, and anchors
- 10.9 Naval architecture

11.0 OTHER

- 11.1 Other

Appendix III - PDF eXpress

Section 1 - Background

The Proceedings of all IEEE sponsored conferences are included in IEEE Xplore, an on-line electronic archive. This includes the OCEANS Conferences which are jointly sponsored by the IEEE Oceanic Engineering Society (OES) and the Marine Technology Society (MTS). To support inclusion in Xplore, IEEE now requires that all papers submitted for Conference Proceedings are compliant with IEEE's PDF standard. They have provided an on-line tool, PDF eXpress, that:

- Can check a PDF document for compliance and indicate what the problems are if the document is not compliant.
- Can convert a Word, LaTeX, or other source document to the compliant PDF form.

Each OCEANS Conference registers for PDF eXpress with IEEE. The Conference then provides all authors with a Conference ID (e.g., OCEANSdc05) and a link to the PDF eXpress pages for that Conference. Authors create their own PDF eXpress account for each OCEANS Conference in which they participate using the Conference ID, their own email address, and an author specified password.

This process is not always easy to understand and IEEE is improving PDF eXpress. It was initially implemented in 2005.

The following hints are NOT exhaustive, but they cover the most common complaints of OCEANS authors for some past OCEANS conferences. The complaints received directly from colleagues and indirectly through the two organizing committees came in only two flavors:

1. PDF files authors had created themselves with personal or institutional copies of Acrobat were rejected by PDF eXpress because some of the fonts used in the files had not been embedded.
2. The figures that authors had so carefully placed in their Word documents got moved around in awkward ways when PDF eXpress was used to produce the compliant PDF.

Section 2 - IEEE On-Line Support

IEEE has a number of help pages for PDF eXpress. The gateway page is <http://www.ieee.org/portal/pages/pubs/confstandards/pdfexpress/index.html>. The following link: <http://www.ieee.org/portal/pages/pubs/confstandards/pdfs.html> was recently updated and gives detailed information on the PDF specifications. You should also look at <http://216.228.1.34/pdfexpress/pdfcheck.asp>, *Understanding and Using the PDF Check Report*, which provides some information about the meanings of the cryptic error and caution messages that PDF eXpress produces when you ask it to check a PDF file for compliance with the standard.

Email support is available at pdfsupport@ieee.org. They guarantee to get back to you within three days.

Caution

Note that some of the messages PDF eXpress emails to you or displays in your browser while you are working with it may make you think that PDF eXpress is submitting the paper to the OCEANS Conference for you. **THIS IS NOT THE CASE.** No matter what you think the message says, PDF eXpress is **NOT** submitting the paper. The authors have to submit the certified PDF through the OCEANS Conference web site yourself.

Test System

For what it's worth, the OCEANS Webmaster was running Windows 2000 on a Dell Latitude laptop, using Microsoft Office XP and with up to date service packs and other updates for both Windows 2000 and Office XP (July 2005). He had Acrobat 6 Professional installed and integrated with the Office programs. "Integrated means that there is a Convert to PDF icon in the tool bar of programs like Microsoft Word. There are also a couple of Adobe menus in these programs.

The information below is specific to this system, but it is believed to be more broadly applicable. It should, for example, work with Windows XP and, with some variations, with Acrobat 5 and 7.

Two approaches are documented. In either case you write the paper in Word and then:

- Produce a compliant PDF with Acrobat and verify compliance with PDF eXpress.
- Produce a compliant PDF with PDF eXpress.

The first is only applicable if you have access to a full distribution of Acrobat (Reader, Distiller, PDFMaker, etc.). The second method can be used by anyone. The OCEANS Webmaster actually got a cleaner PDF from PDF eXpress than from his own copy of Acrobat, which added a couple of red lines along the side of one of the figures.

Section 3 - Producing a Compliant PDF with Adobe Acrobat

Load your completed paper into Word and click the Convert to PDF button or select that option from one of the Adobe menus added to Word when Acrobat is installed.

Submit the PDF that is produced to PDF eXpress following the directions provided by the OCEANS Conference web site and on the IEEE site to which you will be directed. (You will have to start a new account or log into your existing one. See the section of this document titled Background.) PDF eXpress will mail you a report after a few minutes. This is the PDF Check report described on <http://216.228.1.34/pdfexpress/pdfcheck.asp>. If the report says your PDF is compliant, submit it to the Conference. You're done. This is unlikely the first time. If it says your PDF is not compliant, continue with the steps below.

The report will contain a list of errors and cautions. Don't worry about the cautions. The errors will be a list of fonts that are not embedded in your document. Print the report or keep it visible on your desk top so that you can refer to it in the steps below. Return to your paper in Word, select Change Conversion Setting from the Adobe PDF menu, and select the Settings tab on the Acrobat PDF Maker pop-up, which is shown **Figure 10**.

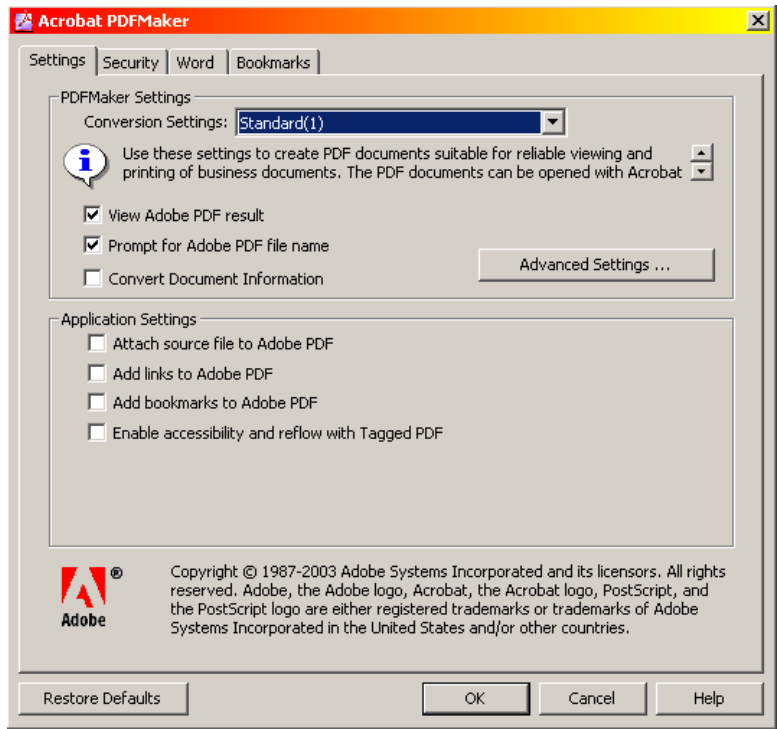


Figure 10 - Adobe PDFMaker options.

Deselect everything except View Adobe PDF result and Prompt for Adobe PDF file name. Then click the Advanced Settings button.

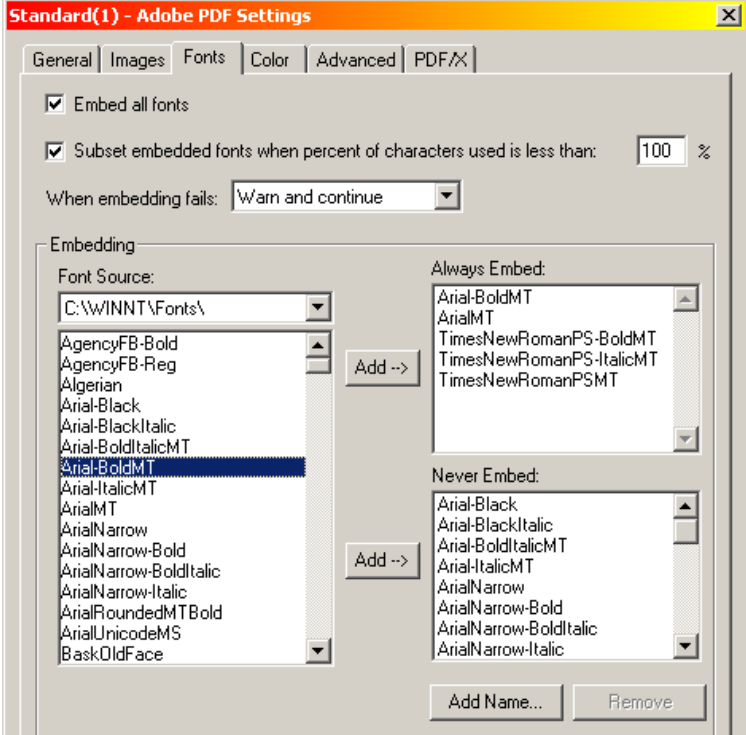


Figure 11 - Adobe PDFMaker settings.

The Adobe PDF Settings pop-up is shown on **Figure 11**. Available fonts are listed on the left. Always embedded fonts are listed on the upper right. This list may be empty when you start. His was, but he had just reinstalled Acrobat. Never embedded fonts are listed on the lower right. The fonts listed as not embedded in the report you received from PDF eXpress may be in this list. All of his were.

Select each of the missing fonts, one at a time, from the Available fonts list and add them to the Always Embed list by clicking the upper Add button. These fonts will be automatically removed from the Never Embed list. The font called Arial-BoldMT, which was identified by PDF eXpress as not being embedded in his paper, is selected above and has been added to the Always Embed list.

When you have moved all of the missing fonts into the Always Embed list, click the OK button in the Adobe PDF Settings pop-up and then in the Acrobat PDF Maker pop-up to save the changes and return to Word.

Click the Convert to PDF button and submit the PDF that is produced to PDF eXpress. You should be all set.

Notes

He moved the fonts over to Always Embed one at a time. You can probably add all of them at once by using the CONTROL key to make multiple selections from the Available fonts list.

Putting all available fonts into the Always Embed list may work, but your PDF will probably be much larger than it needs to be. His PDF with forced embedding was larger than his PDF without forced embedding. He suggests that you only move over the fonts that PDF eXpress insists you need.

Emptying the Never Embed list might be a good answer. He suspects that allows Acrobat to embed the fonts it needs. However, he didn't try it and he doesn't know. Feel free to experiment.

Section 4 - Producing a Compliant PDF with PDF eXpress

OCEANS authors who have used PDF eXpress to convert a Word document to a compliant PDF document have observed unwanted changes in the placement of figures and captions. On some level this is actually a Word problem. How you format the Word document makes a difference in how the conversion proceeds.

The OCEANS Webmaster did not experience figure movement during conversion by PDF eXpress. However, he has learned, through experience, to be very careful and consistent with figures in a two column Word document formatted for OCEANS. Otherwise the figures move around in Word and when he sends the file to different printers. The practice described below has a track record with him and with some colleagues and seems to help with PDF eXpress.

Do not cut and paste or select and drag to insert figures. Use the Insert menu. IEEE actually suggests this in one of their PDF eXpress support pages. The click path from the menu is Insert >> Picture >> From File... Then browse to the image file and insert it.

Right click on the image and format it (size, lines, color, etc), being sure to set the Wrapping Style to Top and bottom. Select the Layout tab in the Format Picture pop-up and click the Advanced... button to reach this option.

Now create a text box. The icon is on the Drawing tool bar. Follow this click path View >> Toolbars >> Drawing to turn on the Drawing toolbar if it is not already enabled. Like an image, a text box is an object and has certain special properties. In particular, you can drag it around and position it.

Type the caption for the figure into the text box, formatting the text and the box as necessary. Formatting the box will include sizing it to fit the figure and probably turning off the default outline.

Position the image and the text box relative to each other and select both objects, image and text box, using the Select Objects cursor on the Drawing toolbar. You can click and drag a box around the two objects with the cursor enabled or click each individually with the CONTROL key held down and the cursor enabled.

Right click on either object and select Grouping and then Group from the pop-up menu. This will produce a single object; image and caption are now locked together.

Left click again and reset the Wrapping Style to Top and bottom. Word puts it back to one of the In-Line options when you group the two objects.

Position the figure where you want it. Make sure it fits between the margins of a single column. If it needs to be two columns wide it should be inside a pair of Section breaks with the style set to one column in between.

Notes

The figures are less likely to jump in Word if you place them in order from first to last after you have written the text. It can also help to put a temporary page break at the end of your document so that you have a blank page on which to build the images and captions into figures.

It may help in some instances to force page and column breaks manually.

Tables are, in some ways, better behaved in Word than objects. Some colleagues use a one column by two row table for their figures. The image goes in the top cell and the caption in the bottom cell. It is suspected that a table will not jump around as much as an object when PDF eXpress is used, but you do not have as much freedom in the placement of a table as you do in the placement of an object. It's your call.

Appendix IV - PCO – Conference Management

To provide consistency from Conference to Conference and to provide conference management assistance to the LOC, MTS and IEEE/OES have contract with a PCO organization to provide a set of services to the Conference Committee. There is a fixed set of services, with another set of optional services made available to the LOC and to be selected by the LOC, as partially listed below. The cost of services is to be borne by the Conference. The LOC should select services in a cost-effective manner, based on augmenting the capabilities and interests of the LOC members. For instance, contracting for services like convention centers, hotels, decorations, air travel, cars, buses, etc., may be the responsibility of the PCO. Banquet activities are possibly done by the PCO with assistance from the LOC, including the monetary negotiations.

Concerning the North American Conferences, IEEE/MCM is – at the time of the writing - under contract to the OCEANS Conferences [MTS and OES] from 2009 through 2012 to provide exhibit management. MCM will work with the Exhibits Chair to secure space at the venue and serve as the direct liaison with all vendors and exhibitors is required. The contract spells out over 25 tasks for MCM to do including pre-event, on-site to post-event tasks.

Below is a typical list of services provided by the PCO, Societies or the LOC. Note that several of these services are included in the Website tool provided by the Societies. The PCO can be contracted for the necessary services as required for each specific conference.

On Line Conference Registration (Pre-Registration/On-site) - Societies

On site Registration administration – Societies or PCO

On Line Hotel Room Block Management - PCO

Site Selection & Contract Negotiation - Societies or PCO

Facility Logistics Pre-Planning & Coordination - PCO

Facility Management On-Site - PCO

Exhibit Management – PCO or LOC (in special cases)

On-site Exhibit Management – PCO or LOC (in special cases)

Budgeting & Financial Management – LOC/Societies

Technical Program Coordination – LOC/Societies

Publication Management - Societies

Mailing List Management & Maintenance – PCO/Societies

Conference & Attendee Surveys - PCO

Project Management & Coordination – PCO



Appendix V - IEEE required documents

IEEE Conference Documentation Templates

The IEEE conference management department has developed a series of documents that both assist conference organizers and serve as guidelines for them. Templates for these documents can be found on the IEEE web site. They can be reached by using the following steps:

- Go to <http://www.ieee.org>
- click the Conferences tab
- click the Organize a Conference Tab
- on the left dropdown table select Required Documentation

The templates can be accessed by clicking on the titles. A list of the documents is given below.

- Checklist and Timelines
- IEEE Conference Schedule
- IEEE Call for Papers
- Principles of Business Conduct/Conflict of Interest
- Memorandum of Understanding
- Financial
- Technical
- Fiscal Agent
- Conference Insurance Form
- Conflict of Interest Form
- IEEE Financial Web Form
- IEEE Concentration Banking
- Certification of Accuracy
- 1099&1042 Schedule of Payments
- Financial Reporting Workbook
- Audit Material Checklist
- Conference Publication Form
- Copyright Form
- US State Tax Exemption Form
- Additional Resources

These are useful as models to develop the specific conference planning and operational activities.

Appendix VI - Memorandum Of Agreement

Memorandum Of Agreement

Between

The IEEE Oceanic Engineering Society (OES), the Marine Technology Society (MTS),

And

The OCEANS'XX MTS/IEEE City General Chair

Conference Background

OCEANS'XX MTS/IEEE conferences are produced planned and organized as a collaboration of the Marine Technology Society (MTS) and the Oceanic Engineering Society (OES) of the Institute of Electrical and Electronic Engineers (IEEE). The term "Society or Societies" is used in this document to refer to these two organizations collectively. They will be listed separately by name as appropriate. The name OCEANS is used to refer to all conferences in the series independent of year or venue location. The term "General Chair(s)" in the document refers to the person(s) responsible (co-responsible) for the conference. The acronym LOC refers to the Local Oceans Committee and the acronym JOAB refers to the Joint Oceans Administrative Board.

The OCEANS Conference is the flagship technical conference and exhibition of the Societies and the premier conference for the ocean community.

The OCEANS Conference Guidelines and any subsequent revisions are provided to the local organizing committee when approached to submit a proposal to host an OCEANS Conference. These Guidelines, along with copies of any standing contracts, provide general direction to the conference committee, and define relationship as well as the working protocol between JOAB, the LOC, and supporting Contractors.

The Societies have mutually entered into multi-year contracts for OCEANS Conference support services and web site hosting. Our standing multi-year OCEANS contracts for conference services shall be utilized by each LOC. Utilization of our standing contracts by the LOC provides your committee access to professional expert resources needed to plan and execute your program, establishes conference continuity year to year, and reduces financial and legal risk.

The LOC General Chair(s) and its financial chair must be members of MTS and or OES. Only members of one of these Societies may be appointed to serve in these positions, by the Society presidents, on a Local OCEANS conference Committee. The LOC, whose focus is to manage the local content of each conference, agrees to work under the direction of JOAB. The Societies will provide from time to time specific Society expectations for results, but will allow the local committee to conduct the conference within the limitations of the MOA, the Guidelines or any written instructions from the Societies delivered to the LOC.

Since each LOC consists of members who as volunteers may require a different combination of contractor services, the local committee will select those additional support services from the applicable conference support contractors.

Understanding

1. The LOC is not authorized to contractually (legally) bind the Societies outside the contractual limits set herein. In particular, hotel contracts requiring a financial commitment must be signed by the contractor approved by the societies.
2. Any management or direction provided by the General Chair(s) to a contractor that involves changes to a signed contract, alteration to an approved and agreed-to scope of work, or changes in financial understandings or financial agreements must be approved by the Society. Any contract exceeding 10,000 USD must be approved by the Societies and signed by their seated presidents.
3. Any series of contracts less than 10,000 USD awarded to a single vendor or to the same source, the total of which is over 10,000 USD will, for signatory purposes, be considered as one contract greater than 10,000 USD. Hence, all contracts in that series require Presidential approval.
4. All contracts less than 10,000 USD involving the OCEANS Conference, such as for arrangements and transportation, must be signed or co-signed by a General Chair or the Financial Chair of the OCEANS Conference.
5. Nevertheless, signature authority on any subcontract obligating the Society regarding an OCEANS Conference belongs solely to the Presidents of the Society. The Executive Director of the Marine Technology Society has the authority to proxy for the Marine Technology Society President when necessary. The Treasurer of the IEEE Oceanic Engineering Society shall be the alternate signer for the IEEE Oceanic Engineering Society President when conditions warrant.
6. During the preparative phase of the conference an account will be installed at a local bank. This account is meant to enable the General Chairs to act promptly to certain demands during the preparatory phase of the OCEANS conference. Signature authority for said account belongs to the General Chairs and the finance chair of the OCEANS'09 Biloxi conference. The Executive Director of the Marine Technology Society and a designated authority of the IEEE Oceanic Engineering Society will be given signatory authority on this OCEANS Conference bank account.
7. In addition to the conference General Chair(s) and the conference Finance Chair, all other volunteer chairs who make or contribute to financial decisions must sign a Conflict of Interest Form*.
8. The single point of contact for contractual performance between a contractor, the Marine Technology Society, and the IEEE Oceanic Engineering Society for a given OCEANS Conference is the Conference General Chair(s) who is (are) the Society's agent(s) for the conference. The General Chair(s) will manage and direct the contractors for that conference. Projected expenditure levels will be identified in the budget submitted to the Society for approval.
9. The Marine Technology Society and the IEEE Oceanic Engineering Society agree in principle that all costs incurred as a result of a given OCEANS Conference are billed to and paid from the budget of that Conference. All significant expenditures (defined by the Guidelines and this MOA) require Society approval.
10. The Marine Technology Society and the IEEE Oceanic Engineering Society may appoint its Financial Officer as the Point of Contact with regard to contractual financial obligations to the contractor with the support of the Society staff and/or legal council as required.

11. The General Chair(s) of each OCEANS Conference agree(s) to follow the Guidelines for Organizing and Conducting an OCEANS Conference as provided. Should the General Chair(s) wish to deviate from the Guidelines, prior written approval should be obtained from the Society President.
12. The General Chair(s) of each OCEANS Conference agree(s) to use the facilities negotiated by the Marine Technology Society and the IEEE Oceanic Engineering Society which have established support contracts for Web Site Support and Conference Management Services.
13. The Local OCEANS Committee (LOC), formed to plan, organize and conduct the Conference, is directed to report to the Joint Oceans Administrative Board (JOAB) in developing their budget, technical program, exhibits, publications, publicity, and similar activities.
14. It is expected that all local committee chairs will keep their committee positions and continue to discharge their duties until the conference is officially closed by the Societies.
15. The Societies reserve the right to require that a local committee member resign from their position and be removed from acting on behalf of the OCEANS Conference.
16. All members of the local committee must be made aware of and acknowledge to the General Chair(s) that neither the Marine Technology Society nor the IEEE Oceanic Engineering Society indemnify non-members acting on behalf of the OCEANS Conference. The Marine Technology Society and the IEEE Oceanic Engineering Society are not liable for any legal suits that might be brought against the non-MTS and non-IEEE local committee members as a result of the OCEANS Conference. Nor is either Society liable or responsible for legal costs under the rubric of the OCEANS Conference with regard to the activities, statements and representations made by non-members.
17. The LOC must interact with JOAB through designated Liaisons. The Liaisons should attend, either virtually or in person, each conference committee meeting and are expected to provide regular status reports to the Society during the year prior to the Conference.
18. The LOC and JOAB will jointly conduct a wrap-up of the conference. The local committee of each OCEANS Conference will submit a final report. This report should cover pertinent aspects of the conference such as finances, technical program, exhibit, and lessons learned.

* Both MTS and IEEE conflict of interest forms

President, OES	Date
President, MTS	Date
General Chair OCEANS'XX MTS/IEEE City	Date

Appendix VII - Letter to the General Chair

OCEANS'XX MTS/IEEE CITY

To General Chair of OCEANS'XX MTS/IEEE Americas

We are pleased to appoint you as the General Chair of OCEANS'XX MTS/IEEE City, serving as the agent of the Societies. We appreciate the commitment that you and your Organizing Committee have made towards serving the Ocean Community. We look forward to a successful conference and a mutually supportive relationship among your Committee and the two sponsoring Societies, the Marine Technology Society and the IEEE Oceanic Engineering Society.

The primary supporting group, as you prepare and conduct OCEANS'XX MTS/IEEE City, will be the Joint OCEANS Administrative Board (JOAB). The JOAB members we have appointed to assist you all have extensive direct experience with OCEANS Conferences; they can answer any question you may have. They will help you with contact and procedural information and provide general and specific guidance. The corporate memory they provide will help you maintain the features common to all OCEANS Conferences as you develop the individual character of your OCEANS Conference.

MTS and IEEE/OES have established support contracts for Web Site Support and Management Services. Our representatives will assist you in making use of the services these contracts provide. In consideration of your appointment, we expect that you will follow the guidelines and procedures associated with OCEANS Conferences. We further expect that you will keep us fully informed, through JOAB, with regard to your progress and any difficulties you experience. You should plan to meet regularly with JOAB.

Three copies of a Memorandum of Agreement, signed by the Presidents of the Societies and confirming our mutual obligations, are enclosed with this letter. Please sign all three copies and return one to each Society President.

Our Societies are fully committed to your success. You should feel free to call either one of us at any time.

Sincerely,

President, OES

Date

President, MTS

Date

