

GUIDELINES FOR PROPOSALS FOR HOSTING AND CONDUCTING THE OCEANS’XX MTS/IEEE CONFERENCE

August 1999

Introduction

The Marine Technology Society and the Oceanic Engineering Society of the Institute of Electrical and Electronic engineers cosponsor a joint conference and exposition on ocean science, engineering and policy. These guidelines provide information to assist in the development of proposals and plans necessary to host and conduct the conference and exposition.

Conference Characteristics

The conference provides a forum for the working scientist, engineer and manager in the marine affairs subject area to present and gather information on ocean science, engineering and policy. The exposition provides a forum to display the state-of-the-art technology and instrumentation available in the marine field.

The conference program consists of technical paper sessions and exhibits, complemented by tutorials, short courses, student paper and/or poster sessions, panel discussions, awards ceremonies, tours, receptions, and other professional and social activities. A conference proceedings is published before the conference and made available at the conference. All papers given at the conference are included in the proceedings. Specific functions and considerations include:

- a. Time period - in the fall, preferably September, October or November; particular attention must be given to avoiding conflicts with related subject events.
- b. Location - various sites throughout the U.S. and Canada. And possibly other international sites.
- c. Duration - normally three days; four days if tutorials are held.
- d. Size - typically between 1000 – 2000 attendees
 - 150 10 x 10 ft. exhibit booths
- e. Technical papers - between 200 - 400
- f. Technical breakouts - 10 - 12 separate rooms
- g. Luncheons - 2 with approximately 400 attendees for each
- h. Social events - 1 evening function
- i. Receptions - 2, including a welcoming function and a function in the exhibits area
- j. Administrative meetings - approximately 10
- k. Sleeping rooms - escalating from 50 on the initial night to 450 on the peak night; total sleeping nights approximately 1800
- l. Finances - Revenues of approximately \$500,000 - \$550,000
 - Expenses of approximately \$420,000 - \$460,000
 - A surplus goal of about 20 percent of expenses

Process

Members of MTS and/or IEEE/OES in a geographic area who desire to host the event generally propose the location of the Conference. A Joint MTS/IEEE Coordinating Committee reviews the proposals and recommends a location to the elected leadership of the two societies who exercise final approval authority for the location selection.

A committee of volunteer members who represent the interests of the two sponsoring societies is used to plan and manage the detail required to develop and structure the conference and exposition. The

conference committee personnel primarily consist of individuals from the area in which the conference is held.

Action

About five years before the event date, a proposal to host the conference and exposition should be submitted to the joint conference committee consistent with the guidance in Part A. Because of the size of the conference a space must be reserved at least three, and in many areas, four years in advance of the desired date.

After approval of a site location by the leadership of the two societies, the host group should develop and submit a conference plan to the joint conference committee consistent with the guidance in Part B. The plan should be drafted at least 15 months before the event and preferably about 18 - 20 months in advance of the conference date.

Part A - Proposal for Location Selection

A1. Introduction and Area

This section should identify the geographical area and its relationship to marine community activities in general. The reasons for desiring to host the joint conference should be indicated as well as the year in which the conference will be held. Any other information of a general nature might be included.

A2. Infrastructure

This portion should give details on the local MTS and OES organizations in the area and their relationships. The strengths in terms of numbers and leadership of both local organizations should be indicated.

Details on the local industry, private institutions, colleges and universities, government and other societies, which have an interest in and might support the conference, should be included.

A3. Facilities

This section should give a rundown of hotel and conference center alternatives in the area, and should recommend specific facilities. The proposal should identify the number of meeting rooms, the exhibit hall facilities and number of sleeping rooms available. An enclosure to the proposal might provide a graphic presentation of the facilities.

Some description of the air and ground transportation capabilities should be described. Any special considerations or problems associated with international travel should be noted.

A4. Organization

While it may not be possible to identify all potential future permanent planning committee members, as much detail as possible on interested personnel and their affiliation should be given. A potential chair who may become the final chair should be identified. A proposed planning committee structure is included in Part B.

MTS and OES have contracted with a conference management service to provide support to the local conference planning committee. The level of support required from the service will vary annually consistent with the capabilities of the members of the conference committee. Appendix B-1 outlines the list of contracted and available services from the management service. It is emphasized that the conference committee shall have overall authority and responsibility for the contents and structure of the conference. The management service is a contractor who works for the committee by fulfilling tasks and functions selected by the committee.

Part B - Conference Plan, Organization and Development

B1.0 Sponsors

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.

B1.1 Local Chapters and Sections

The success of the Conference is dependent upon harmonious working relationships with the local chapters and sections. They have a responsibility to support the Conference with volunteers, advertising, in some cases advance funds, and to assist in bringing the resources of the host community to provide assistance (Chamber of Commerce, etc.). They will also share in the revenues (surplus) of the Conference based upon an approved distribution formula specified independently by each society.

B1.2 Participating Organizations

In addition to the joint sponsorship, by MTS and IEEE/OES, other ocean-oriented societies may be considered as participating organizations. This is highly desirable from a standpoint of participation and a broad base for publicity of the Conference. A participating organization does not share in the financial aspects 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 the Liaison Committee. The Participating Societies will advertise the Conference in their respective journals at no cost to the Conference and the Participating Societies members are permitted to use MTS and/or IEEE/OES member registration rates for conference activities. An exhibit booth may be offered to a Participating Society in exchange for their advertisement of the Conference (see booth barter policy in Section 6.4.4). In some instances related societies might consider back-to-back conferences with the Conference, with provisions for joint registration.

B2.0 Conference Committee Responsibilities

The Conference Chair and Committee are the key to a successful Conference. The selection process should place primary emphasis on the qualifications rather than the societal membership of candidates. A Conference Committee shall be established by the Chair to conduct the Conference. Committee members shall be identified in an organization structure submitted to the societies for approval. The organization and membership of the Committee may vary according to the wishes of the Conference Chair; however, responsibilities for arrangements, technical program, exhibits, and financial accountability shall be clearly established. The membership of the Committee shall be reasonably proportioned between the sponsoring societies. Membership in either society is a prerequisite for serving on the Committee. Once approved by the sponsoring societies, the Committee has the authority to proceed within the terms of a plan and budget.

B3.0 Liaison Committee

A Liaison Committee to the Conference consisting of one member from each society (MTS and IEEE/OES) shall be established. Each society will appoint its representative. The responsibility of the Liaison Committee is to advise the Conference Committee, and to present each society's view on items which require sponsoring approval. When a society approval is needed, the Liaison Committee members representing each society shall be responsible for seeking such approval in a timely manner.

Additional authority, such as actual approval authority, may be delegated to its Liaison Committee representatives by either society. The Liaison Committee shall approve all changes to an originally approved Conference Plan.

The Liaison Committee shall act as the communication path for this Conference with respect to contractual aspects between the Conference Committee and the Societies. In the absence of a Liaison Committee for a future Conference, the Joint MTS/IEEE Coordinating Committee shall be the communication path between the Conference Committee for that Conference and the Societies.

B4.0 Conference Management Services

To provide consistency from Conference to Conference and to provide conference management assistance to the local Conference Committee, MTS and IEEE/OES have contracted with a conference management service 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 Conference Committee and to be selected by the Conference Committee, as listed in Appendix B. The cost of services is to be born by the Conference. The Conference Committee should select services in a cost-effective manner, based on augmenting the capabilities and interests of the local Committee members. Contracting for services like convention centers, hotels, decorations, air travel, cars, buses, etc. is probably best done by the conference management service. Registration and publication of the Conference Proceedings are best done by the conference management service. Banquet activities are best done by the Committee, but the management service is usually best equipped to handle the monetary negotiations. Depending on which services are to be provided by the management service, some of the subcommittees discussed below may not be necessary (e.g., Exhibits and Registration Committees).

B5.0 Sponsoring Society Approvals and Services

The local Conference Committee has complete authority and responsibility for the Conference, except where such authority is restricted or reserved by formal agreement between MTS and OES. A copy of the MTS/OES Agreement, which spells out such relationships, will be furnished to the Conference Committee Chair. The sponsoring societies have reserved approvals of the specific items listed in Section B5.1 below. Once approved, neither society can unilaterally change these items.

The sponsoring societies are expected to provide assistance to the Conference Committee, at no charge, as outlined in Section B5.2.1 below. In addition, certain reimbursable services may be provided as outlined in Section B5.2.2 below. The rates shall be agreed to by the Conference Committee and the sponsoring Societies at the time of approval of the Conference Budget by the Societies.

B5.1 Sponsoring Society Approvals. The following require joint approval of the OES and MTS:

- (1) Conference location and hotel - done in the location proposal process
- (2) Conference date (including related events) - done in the location approval process
- (3) Conference Plan that includes:
 - a. Conference Chair and Technical Program Chair or Co-Chairs
 - b. Conference organization structure
 - c. Conference Budget
 - d. Conference Theme
 - e. Participating organizations
 - f. All financial grants to the Conference

B5.2 Sponsoring Society Services

B5.2.1 Non-reimbursable Services

- a. Legal assistance of a consulting nature.
- b. Editorial promotion of Conference in society publications.
- c. Efforts expended by officers and members to attract key personalities.
- d. General support under the control and direction of society officers.
- e. Membership and attendance at advisory or other meetings.
- f. Material from previous Conferences.
- g. Legal fees in support of litigation
- h. Mailing and membership lists
- i. Advertisements in society publications

B5.2.2 Reimbursable Services

- a. Funds advanced for initial support

B6.0 Organization

The Committee is responsible for the organization of the Conference. The IEEE Meeting Organization Manual "A Guide to Conference Planning" is recommended as a guide. See Figure 1 below for a typical Conference organizational structure. Variations of this that make sense to the local Conference Committee are acceptable.

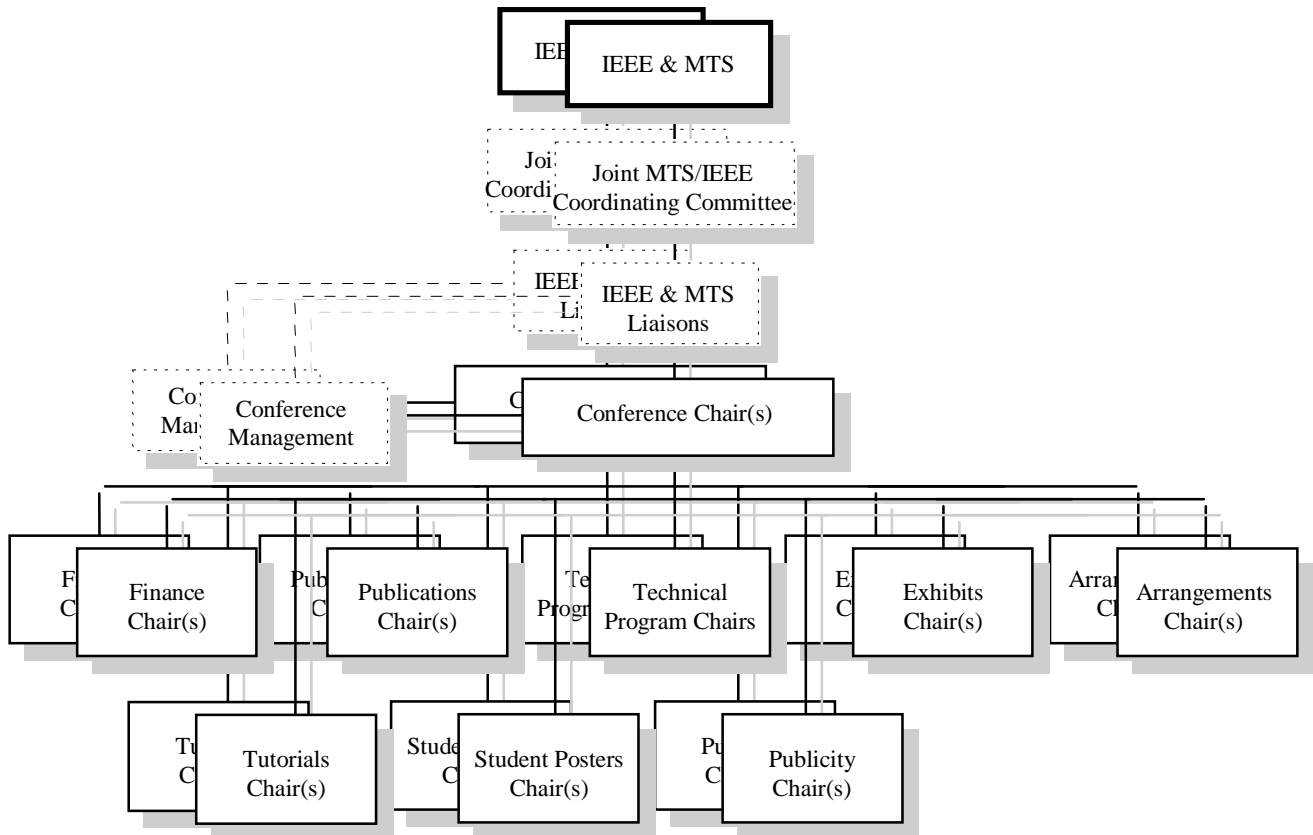


Figure 1. Typical Conference Organization Structure

B6.1 Technical Program Committee

The Technical Program Committee is responsible for proposing and organizing a technical program. Since both sponsoring bodies have a technical base, a substantial effort shall be made to provide the highest quality technical program possible. The program should focus on the conference theme as well as address the major technical interests of the sponsors, as expressed by the MTS and IEEE/OES Professional and Technology Committees. Wherever possible, papers should be consistent with the conference theme and/or the specific subject areas of the Professional and Technology Committees, which should be included as tracks in each conference. The conference theme generally emphasizes some current event or activity relative to the site location. The technical program format should be consistent from year-to-year and consist of plenary sessions, technical sessions, and dedicated time for visiting the exhibits.

The technical program shall be handled by a Technical Program Committee, typically co-chaired by a person from each society. This Committee shall consist of the Technical Program Chair or Co-Chairs and a group of professionals who can solicit papers, review and referee papers and provide session chairs. Whenever practical, the technical session chairs shall be members of either sponsoring body. Selection shall be from the most appropriate society with co-chairs encouraged where joint interest is indicated. Geographical constraints shall not be included in selection criteria. The Technical Program Committee shall be responsible for providing for paper referees, filling out the session with invited papers, arranging the sessions, and conducting the sessions. The sponsoring societies, through their technology committees, shall assist the Technical Program Chairs by soliciting papers, providing session chair nominees, and paper referees. Contact with the society technical committee chairs at an early stage in the development of the technical program is highly recommended.

A Call for Papers shall be distributed using the conference mailing list, as well as be published in the IEEE/OES and MTS publications. The initial "Call" announcement should be made about 14 months before the conference date, and distributed at the preceding conference as well. The "Call" should provide the maximum amount of information concerning the requirements and restrictions applicable to the paper to be considered for presentation. Some examples include:

- a. Papers must be original work.
- b. Significant advertising will not be accepted.
- c. Abstract describing the paper should be 300-600 words.
- d. Abstract due date; consideration should be given to holidays especially when the conference date is in September.
- e. Notification of acceptance date; upon acceptance, a non-refundable \$100 deposit will be required to encourage authors to attend the conference; the deposit will be applied toward the registration fee.
- f. Paper due date and any guidance concerning drawings and photographs.
- g. A six-page total paper limit. To encourage adherence to the six page limit, the Conference Committee has the option of charging an excess page charge (e.g., \$150/page) or, if the page charges are not paid, to not publish the paper.

The actual number of papers will vary depending on the quality of abstracts received. The program content must be based on serving the best interests of the societies and the community. It is important to select papers early enough to give authors time for preparation and the process must allow the technology groups and societies to review the abstracts and make recommendations for their selection. This is especially important where federal employees must receive release. Session chairs should have access to copies of the final papers prior to the Conference so that they can prepare themselves to conduct the sessions. The goal of the Conference is to exchange state-of-the-art information and to insure that the attendees are afforded the opportunity to catch up on what is going on in their particular field of interest. To further aid in achieving this goal it may be desirable to allocate one session for reports of late breaking developments - not requiring submission for formal papers. This should be considered for all

meetings. Significant high quality papers of permanent value should always be given priority in the selection process. It is noted that it is the current policy of the societies that all papers presented at the Conference be published in the Conference Proceedings.

B6.2 Publications Committee

The Publication Committee is responsible for the Proceedings and other technical publications of the Conference. This may be organized as part of the Technical Program Committee or separate from the Technical Program Committee, depending on the preference of the Conference Committee. It is recommended, however, that the Proceedings be controlled by a committee separate from the Technical Program Committee. Conference Proceedings of journal quality shall be published and made available at the Conference to attendees and the sponsoring societies. Proceedings are to be made available in both paper and Compact Disk (CD) forms, with the registrants making a selection of their choice. Copyrights shall be applied for in the name of one society on an alternating year basis. Each society will have rights to reprints, post-Conference sales, unlimited access and unlimited use of the Proceedings. Papers in the Proceedings may be published by either sponsoring society in the publications of that society, independent of which society holds the copyright. Each organization shall be free to buy, at cost of manufacture, as many copies of the Proceedings as it designates before the time of determining the size of the print run. Excess Proceedings will be divided evenly between the two societies.

B6.2.1 *Products*

A Publications Chair and Committee are responsible for producing the following publication products:

- One-page preview flyer
- Call for Papers
- Conference letterhead stationery
- Authors' kits
- Advance program
- Final program
- Informational Posters for registration area, etc.

The significance of the work of the Publications Committee is summarized as follows:

- The cost outlay for the Conference publications, particularly the Proceedings, is one of the largest of any cost obligation of the Conference. The Committee can therefore have a significant effect on the Conference Budget. The printed version of the Proceedings is more expensive than the CDROM version to produce. However, estimating the number of each version to produce is difficult. Contact should be made with the prior year conference committee to get a feel for the trend by registrants in selecting either the printed or CD version of the Proceedings. If possible, a question should be included on the advance registration form to provide a choice for each advance registrant to select paper or CD for the Proceedings. The price of the Proceedings is to be based on the value of its intellectual property and shall be the same for hardcopy and CD forms.
- The Advance Program is the primary announcement for the conference. Its layout and design can have an influencing effect on attendance. Distribution of the Advance Program is large - about 12,000 copies. Advertisements should be solicited from both exhibitors and non-exhibitors to be included in the document. [It is noted that any impact on the cost of postage as a tax-exempt organization to mail Advance Programs that contain advertisements should be considered by the Societies before encouraging advertisements in the Advance Program.] Additionally, significant effort should be made in the development of the day and time allocations of presentations. These times should be maintained in the

final program to the extent possible. Any changes should be brought to the attention of the presenters well before the conference. Use of a web site that contains the Final Program could be a way to inform registrants of the changes prior to arrival at the Conference. When possible, the Final Program should indicate a time change from the advance program.

- The Proceedings represent the final and permanent library record of the work of the Conference Committee, authors, and exhibitors. Each participant should obtain a sense of pride and fulfillment from it.

B6.2.2 Selection of Printer

Proven performance companies should be solicited for quotes. The most important characteristic of the company that does the printing is that it recognizes its responsibility to deliver the publications when expected. This means that it should have alternative back-up printing capabilities in case of fire, strike, etc. It is also desirable that it has a good reputation for having done the publications for other professional societies. The Conference Management Service has expertise and experience in this area and can generally negotiate a favorable price.

B6.2.3 Handling of Papers

A comprehensive author's kit and an arrangement for having the printer directly involved can substantially facilitate managing the final papers and preparation of the Proceedings.

B6.2.4 Examples of Cost Savings

The following related items should be given consideration:

- * Page limit: A six-page total limit without charge to authors, and an appropriate charge for each page exceeding six pages.
- * Illustrations: Authors submit photos and drawings to a format minimizing work at the printers.
- * Type-set: The use of identical typeset layout for both the table of contents and listings in the final program.
- * Bulk mail: Plan for bulk mail rates and direct mailing from the printers.

B6.3 Finance Committee

A Finance Chair and his 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 Conference Committee shall submit a Conference Budget as part of the Conference Plan outlining anticipated expenditures and income. 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 the Liaison Committee and budget revisions approved, if appropriate.

The Conference Budget shall include a line item for the Student Poster Program, typically for \$15,000.

B6.3.1 Bank Account

An appropriate bank account shall be established by the Conference Committee. Authority to disburse funds shall be limited to the Conference Chair and Vice-Chair and the Finance Chair and Vice-

Chair, and such persons shall be bonded. In addition, IEEE requires the signature of the Staff Director, Financial Services, on the bank signature card.

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 Piscataway keeps the necessary cash available.

B6.3.2 *Audit*

An Audit firm shall be contracted with to audit, consistent with accounting practice, the income and expenditures of the Conference. No member of the Audit group shall have authority to disburse Conference funds.

B6.3.3 *Finances*

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. It is preferred that all financial grants 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 entity.

Interim financial reports shall be made at least quarterly to MTS and OES liaisons to keep the sponsors cognizant of the financial condition of the conference. This should be done by providing an electronic copy in the standard OCEANS Conference format that the conference Finance Chair is to use to manage finances.

B6.3.4 *Insurance and Bonding*

The insurance and bonding shall be provided for the Conference and it will meet the minimum coverage required by each society. Existing society insurance policies can be used as insurance coverage for the event.

B6.4 Exhibits Committee

The Exhibits Committee is responsible for the exhibits at the Conference. The exhibits are an important part of the Conference in that they build attendance, provide an important educational purpose, and provide financial support for the Conference. The societies shall encourage companies to support the exhibit program.

B6.4.1 *Exhibitor Solicitation*

Listing of exhibitors from previous Conferences should be solicited as a high potential base. Exhibitors from Underwater Intervention, OTC, Underwater Technology and other ocean-related conferences should also be considered for solicitation.

Potential exhibitors should be advised of the Conference Plans as soon as possible, better than one year in advance, to enable them to budget and plan for the exhibit.

B6.4.2 *Location and Schedule*

Special attention should be given to the location to assure a logical flow of attendees through the exhibits. Special attractions, such as the free coffee being distributed in the exhibit hall, lunches and other events may be hosted by the exhibitors. Dedicated time should be provided for viewing the exhibits without competition from technical sessions.

B6.4.3 *Sponsor Society Booths*

The sponsoring societies shall have first choice of booth location. A booth for the next year conference, if jointly sponsored, should be aligned with the two sponsors booths such that each sponsor is on one end and next year conference in the center. These booths should be complimentary.

B6.4.4 *Barter Booths*

Some organizations provide service to the conference in the form of free advertisement. Compass Publications, Ocean Technology News, Underwater magazine and participating societies are examples. Organizations may be judiciously provided barter booths in return for appropriate levels of advertisements or assistance to the Conference (i.e., value to the Conference should be 1.5x to 2x the cost of the booth).

B6.4.5 *Complimentary Exhibit Passes*

Exhibitors like to show their display to certain clients during the conference. Each exhibitor should be provided a number of complimentary passes to the exhibits area to permit clients to view the exhibits and talk with the exhibitor. The passes should be restricted to the exhibits area during normal display hours and not include any special events such as free food and drink at the exhibitor's reception or other special events.

B6.5 Publicity Committee

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 which 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.

B6.5.1 *Publicity Media*

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 of the advance program to as many ocean-oriented professionals as is reasonably possible. Posters and advance programs should be available at OTC and other pertinent conferences.

B6.5.2 *International Publicity*

Washington foreign embassies (science counselors) should be given advance programs for distribution. U.S. counselors abroad can be given copies for distribution by addressing these counselors using State Department, Washington, DC, addresses. Direct contract with IEEE and MTS sections is also desirable.

B6.6 Arrangements Committee

The arrangements have a lasting effect on the attendees since this is generally the first and last association with the Conference.

The Committee is responsible for contacts with the hotels, rooms, meals, conference facilities, field trips, tours, transportation, and related items.

All activities planned and carried out by the Conference Committee shall have a truly jointly sponsored image. Each society is expected to support the entire Conference vigorously. Arrangements shall be sufficiently planned to provide an orderly and pleasant experience for the attendees. Excessively lavish and costly arrangements shall be avoided. The Arrangements Committee must establish a medical emergency contingency plan, with hotel staff, in anticipation of an emergency.

B6.6.1 Hotel/Conference Facilities

A hotel or hotels will have been selected; the Committee will be responsible for working out final contractual arrangements with the hotel(s). This will include rates, special meeting rooms, including Conference headquarters and head meeting rooms. The selection and delegation of the meeting rooms for the technical sessions should be worked out with the Program Committee. Past Conferences will provide some insight as to attendance at various sessions. The Conference Management Service contractor can generally negotiate a favorable price better than Committee members.

The appropriate visual aid projectors, etc. need to be provided. Typically these are rented from a service which will provide standby and back-up equipment. Attendance should be taken at each session to aid in projections for future Conferences.

B6.6.2 Meals

One of the largest items in the budget is the meals, which includes luncheons, coffee (AM) and soda (PM) 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 an event. The hotels 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 75 to 85 per cent of the tickets sold as the number of meals to guarantee. The per cent rule should be applied to all ticketed events.

The meal services typically consist of arrangements for authors' breakfasts, two luncheons and one banquet. Other special events may be arranged such as cocktail parties, special dinners for groups, such as the MTS and OES administrative councils. Spending at cocktail parties must be carefully controlled, since this is another area where one can go over budget very quickly. Control may be exercised through the use of drink tickets.

B6.6.2.1 Awards Luncheons

Each society presents awards as part of the Conference. Each event takes about seventy to ninety minutes. Because of the length of each luncheon, separate luncheons are held. The luncheons should be held on the first and second or third days of the conference. A rotation should occur that alternates which society will hold the luncheon on the first day. The society which has the second luncheon that year decides which day they prefer, 2nd or 3rd day.

B6.6.3 Security

It is necessary to arrange for some security, especially in handling the registration desk monies. The exhibits must have some security arrangements, which are in effect 24 hours per day between set-up and takedown.

B6.6.4 *Signs*

When one is working with a hotel, one becomes very conversant with the layout. New arrivals, however, will be confused as to where to go, what to do, and other scheduling questions. Signs and directions should be provided in prominent locations from the time they check-in to the hotel. This costs some money but it is very important in settling the atmosphere of being welcomed and wanted.

B6.6.5 *Registration*

While this part of the Conference lasts only a few days, it is a key element in a smooth running Conference. Some cities have tourist bureaus or convention managers that will provide personnel at no cost to staff registration booths. Wherever possible, such assistance should be welcomed, but reviewed by the Arrangements Chair to ensure that the expected performance could be reliably provided; since cash, money orders, checks, etc. are often handled at this point. At least one member from the Conference Committee should be present at all times. Assistance on how to handle registration is available from both MTS and OES. The Registration Form must solicit information of a statistical nature for future reference.

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.

B6.6.5.1 *Complimentary Registration*

The Chair and Conference Committee must decide in advance which invited guests or speakers may be given free registration and accommodations. This should include gratis attendance at social functions. Complimentary registration should not be given to paper presenters and session chairs. However, there may be unique circumstances wherein an author or chair has difficulty in bearing the cost and is forced to cover expenses in order to present his paper. The Conference or Financial Chair or their designee should have authority to evaluate such selections on a case-by-case basis when brought to their attention. In such cases, only basic registration should be provided - attendance at technical sessions and exhibits.

Key Conference Committee personnel should not receive complementary registration unless it is an out-of-pocket expense and will not be reimbursed by the person's company. Most Government and industry organizations are willing to pay registration costs.

The presidents of each society should receive complementary registration and hotel room.

B6.6.5.2 *Badges*

A color-coded badge policy facilitates identification of various registrants and the access to Conference functions. This is an essential part of registration since Security personnel will use the badge color to admit or exclude persons from events. Ribbons may be employed (Speaker, Chair, Officer, etc.) to distinguish roles of registrants.

B6.6.5.3 *Student Registration*

Both MTS and OES wish to stimulate attendance by students. A significant discount has traditionally been provided to permit students to attend technical sessions and the exhibits for a reduced fee for the duration of the Conference. Such reduced registration does not include any social functions or Proceedings. Definition of a student is always difficult, since some part-time, evening or other "Student" status may be considered by some to qualify them for the reduced rate. The Registration Chair may discuss this with the Committee, but a recommended guideline is that 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. Such registration may be identified by a colored badge differing from full registration.

B6.6.5.4 Life (IEEE) and Emeritus (MTS) Members

Life (IEEE) and Emeritus (MTS) members may register for the Conference at the registration fees equivalent to those for students.

B6.6.5.5 Conference Attendee Surveys

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.

B6.6.6 Transportation

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

Special transportation should 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.

B6.7 Student Poster Program

As a way of getting student participation in the Joint Conference and encouraging them to become active members in the professional societies, the Conference shall sponsor a Student Poster Program. A Call for Student Posters shall be prepared and distributed inviting students to submit abstracts for the Poster Session. The Call for Posters topics should correspond to the Call for Papers topics. Selected students will be given a complementary full conference registration and an allowance for travel and conference expenses. The Student Poster Committee should submit a Student Poster Program Plan based on a budget typically for \$15,000, as included as a line item in the Conference budget. In addition to presenting a poster during the sessions, the student's poster paper will be included in the Conference Proceedings. It should be emphasized that the Student Program should be a poster program. This provides the student maximum exposure to conference attendees and allows for one-on-one interaction with them. During the Conference the poster presentation will be judged and prizes awarded to the top three poster presentations. The awards should be presented to the students during the final awards luncheon of the Conference. The Student Poster Program Plan should provide for a minimum of 10 students.

B7.0 Conference Planning and Milestones

A master schedule should be proposed as part of the Conference Plan covering most major projects. Early planning and activity are essential to avoid last minute crises.

B7.1 Some Particular Key Events:

- Contracts for the conference hotel and facilities must be signed by both MTS and OES presidents or their designees.
- Preparation of the Call for Papers.
- Distributing the Call for Papers especially getting it in the right (time wise) issue of the societies publications. There is generally a delay in the projected time of publications and the actual.
- The authors tend to be late in responding, so time should be allocated for this.
- Preparation of the Advanced Program: one aid is to publish the session subjects and chair and not the entire program.
- Security clearances: While it is the author’s responsibility to assure that the paper is unclassified, this can cause delays.
- Review of papers and selection of authors: This is time consuming but very important to maintaining the high technical quality of the Conference.
- Printing the Proceedings so they are ready for distribution at the Conference. One concept that has sometimes been suggested is to plan two runs of the printing. The first run will be the best estimate of the number of copies needed for the Conference and would include a partial distribution to MTS and IEEE. If the number of attendees exceeded the expectations, the proceedings planned for distribution to IEEE and MTS would be used. If the number required was less than projected the balance would make up a portion of the balance for the IEEE and MTS. The subsequent run would cover the difference. The intent is to minimize the expense of printing an excess number of the proceedings. However, upon closer examination, the costs of a second run have exceeded the costs of a conservative single printing.
- Session management. It is easy to underestimate the number of people required to handle the sessions to provide for a smooth Conference. It is recommended that at least one volunteer in addition to the session chair be assigned to each session to provide help with control, seating, and audio/visual problems.

B7.2 Major Milestone Planning Guide

Major Tasks	Months before Conference
• Proposals for a Conference	54 - 60
• Select chairs	18 - 24
• Select vice-chair and key committee chairs	18 - 24
• Select Conference Theme/major issues	18
• Draft general Conference Plan outline	18
• Define committee needs, responsibilities, tasks, & rough schedules	16 - 18
• Select Conference Committee	16 - 18

• Refine Conference Plan	15 - 16
• Submit budget to OES/MTS	15
• Prepare one-page flyer for publicity & posters	15
• Distribution at current annual Conference (If possible, this should be the Call for Papers)	14
• Advise previous and potential exhibitors of Conference (To enable them to budget and plan for it)	14
• Complete arrangements for participating organizations	12 - 14
• Send Call for Papers to Society newsletters, journals	14
• Attend prior Conference and participate in post Conference debriefing along with detail discussions with each other counterparts to review problems and Previous lessons learned; have a floor plan for exhibit hall to permit sign-up.	Conference date
• Call for Papers and exhibitor materials mailed	11 - 12
• Hotel & transportation arrangements	10 - 12
• Finalize key-note and other speeches	8 - 10
• Call for papers closing time	8
• Notify authors of selection	7
• Mail author's kits	7
• Mail-out exhibition kits	7 - 9
• Plan distribution at OTC. Send advance programs to monthly periodicals	6
• Review papers	5 - 6
• Publicity for society journals & newsletters	5 - 6
• Advance program ready for printers	4
• Photo-ready copies of all papers deadline	3 - 4
• Mail advance programs. Include copies to weekly ocean periodicals	3 - 4
• Publicity to trade magazines release	3
• Local publicity (several releases)	2 - Conference date
• Volunteers identified and all workers assigned	1
• All materials in-hand	2 weeks
• Preliminary report on attendance solvency and stock of Conference records	1 week
• Events of the Conference	0
• Hot wash: Chairs, Liaison, Committee and society presidents should be notified of event.	Final afternoon of the Conference
• Return of advance funds:	6 weeks
• Conduct audit of conference finances	2-4 months
• Complete Final Report to MTS and IEEE/OES and other sponsors (Including closing of the books and distribution of surplus):	4-6 months

B7.3 Volunteer Services

Other resources, that must be marshaled to insure a successful Conference, include the following as examples.

- Each category chair or co-chair should rely as much as possible on his own business office for secretarial and typing services.
- Extra volunteers at Conference time to assist in operating the visual aid machines, assisting in the operations center and other hotel arrangement details are needed.
- Volunteers to assist at the registration desks are also required.

- Travel/tour agents and chamber of commerce-type organizations should be enlisted to provide free services to Conference attendees.
- Student Chapters and affiliates of the societies are a good source of volunteers, and they could be awarded free registration (including meals).
- Volunteers for folding and mailing are needed if a mailing service is not utilized.
- No Conference volunteer shall be reimbursed financially for service rendered.

B7.4 Final Report

The Conference Committee shall prepare and submit a Final Report with a copy to each sponsoring society. This report shall be detailed and shall include the following as a minimum:

1. Summary of the Conference
2. Sections describing:
 - a) Arrangements - particularly successful or unsuccessful arrangements, hotels, publications, advertising services purchased, etc.
 - b) Exhibits - a listing of the exhibitors, any gratis space, and particularly successful or unsuccessful details.
 - c) Technical Program - numbers of sessions, names and affiliations of session chairs, number and affiliation of reviewers per session (or topic area).
 - d) Personnel - a listing of persons and affiliation known to have volunteered and listing of those who actually were utilized in more than a token manner.
 - e) Financial aspects - a summary budget and actual expense/income. Details of particular interest shall be included.
 - f) Registration – a breakout of registration by category: Full Registration / Member, Full Registration / Non-Member, Partial Registration / Member, Partial Registration / Non-Member, Exhibits-Only Registration, and Tutorials Registration.
3. Other - any other information of interest, conclusions and recommendations.
4. Appendices:
 - a) Proceedings
 - b) Detailed financial accounting – submitted in the standard OCEANS financial report spreadsheet (either MS Excel or Quicken spreadsheets or in a format directly transportable into one of these)
 - c) Audit report
 - d) List of attendees
 - e) List of exhibitors.

Appendix B1 - Contracted and Available Optional Services from Conference Management Services Firm

MTS and IEEE/OES have contracted with a conference management service firm to provide a set of services to the local Conference Committee. The firm is contracted to perform a fixed set of services, with another set of optional services to be selected by the Conference Committee based on the capabilities and desires of the committee members. The cost of both sets of services is to be borne by the conference and included in the conference budget. It is stressed that the Conference Committee has overall authority and responsibility for the contents and structure of the conference. The contractor reports to and is provided tasking from the conference chair. All services are performed in close consultation with and under the direct supervision of the conference committee. The committee must receive regular reports from the contractor to insure that the activities authorized to be conducted by the firm are consistent with the needs of the committee.

SPECIFIC SERVICES

The contractor will provide the following services:

1) Conference Delegate Registration

- Receive and process all registration forms
- Create and mail confirmations to all registrants
- Conduct all delegate related invoicing
- Collect and deposit of registration payments
- Process all payments made by credit card
- Order and ship all registration materials to the conference site
- Arrange for the rental, installation and removal of all on-site computer system equipment
- Order registration counters and appropriate signage
- Arrange for and train on-site personnel to assist with data entry and badge production
- Arrange for logistical services in registration area
- Design a badging system, produce and distribute badges
- Produce social function tickets and tickets for proceedings
- Prepare delegate registration packages
- Distribute delegate registration packages
- Prepare periodic and provide final registration reports

2) Technical Papers and Proceedings

- Design, have printed, and distribute Call for Papers
- Receive and process camera ready papers
- Select conference proceedings printer
- Have conference proceedings (CD and paper book) available at conference
- Maintain master conference schedule
- Assign meeting rooms for sessions
- Design, have printed, and distribute advance program
- Design and print the final program

3) Exposition Management and Sales

- Design and produce Call for Exhibitors and registration form

- Process all requests for exhibits information
- Plan and conduct direct mail/telemarketing solicitations
- Accept and process all exhibitor applications
- Conduct all exhibitor invoicing
- Prepare exhibitor service manual and contract
- Design and maintain exhibit hall floor plan
- Distribute exhibitor confirmations and booth assignments
- Arrange for/order exhibit hall materials, i.e., carpeting, etc.
- Interface exhibitors and exhibit hall vendors
- Conduct on-site exhibit hall management, i.e., move-in, etc.
- Arrange food service, coffee breaks, snack bars in the exhibit hall
- Prepare and provide final exposition report

4) Administrative and Finance

Administration

- Conduct pre-conference site visits
- Design and have printed conference stationary
- Negotiate Convention Center contract
- Negotiate headquarters and alternative hotel contracts
- Monitor room pick-ups to ensure proper credits are applied
- Coordinate and book all VIP rooms
- Negotiate and contract for official air carrier and local transportation
- Coordinate social activities
- Schedule space allocations for society administrative functions
- Maintain up-to-date mailing lists purged of duplications
- Arrange for mail house services
- Serve as liaison to conference center, hotel and supplies including transportation
- Implement and maintain the overall conference theme with decorations and signage
- Contract for all vendor related services including: labor services, cleaning, security, floral/greenery, audiovisual, etc.

Finance

- Assist in conference budget preparations with meaningful input about expense
- Open and maintain a conference bank account
- Maintain detailed financial records
- Collect and deposit monies
- Make monthly reports of financial status to the Treasurer
- Review all invoices to ensure accuracy prior to payment
- Prepare all checks for signature by the Treasurer
- Monitor income and expense levels and report deviations
- Prepare and provide a final financial report

OPTIONAL SERVICES

The following services may be selected by the committee to be provided by the contractor:

1) Conference Delegate Registration

- Organize student poster sessions
- Organize tutorial sessions

- Manage a message center
- Arrange for on-site services to assist with mailing

2) Technical Papers and Proceedings

- Receive, catalogue and process all responses to call for papers
- Distribute responses to conference technical committee
- Coordinate and distribute acceptance/rejection notifications
- Manage and carry out all correspondence with authors
- Prepare and distribute author kits (electronically)
- Receive and process copyright forms (electronically)
- Develop conference proceedings (i.e., table of contents, etc.)
- Distribute proceedings

3) Exposition Management and sales

- Tasks and functions as may be agreed to by the conference committee and contractor for any particular conference; costs will be identified in the development of the conference budget.

4) Administrative

- Tasks and functions as may be agreed to by the conference committee and contractor for any particular conference; costs will be identified in the development of the conference budget.

A copy of the current contract that describes the tasks and functions associated with each service is to be available for information.

Appendix B2 – Guidelines for the Student Poster Program

A Student Poster Program has been a part of the Conference since 1989 and has been incorporated as a part of the program of the Conferences. The following guidelines are provided for the administration of the Student Poster Program.

Purpose: The Student Poster Program is designed to foster and promote student involvement in technical conferences and activities of the technical societies and to provide a forum at technical conferences for the student to interact on a one-on-one basis with the Conference attendees.

Eligibility: The Student Poster Program is open to engineering or science graduate and undergraduate students enrolled in degree programs on a full time basis at an accredited university or engineering school. The student cannot present a paper at the Conference in addition to the poster presentation.

Submission Requirements: Eligible students are invited to submit a 500-800 word abstract describing their work, (2) a brief biographical sketch, (3) an endorsement by their faculty advisor or dean and (4) a verification of their student status. The abstracts should describe the problems/questions addressed, summarize the work performed, and present the results/conclusions of their research. Details on the submission of the abstracts will be given in the Call for Student Posters announcement for the Conference.

Selection of Student abstracts: The abstracts will be judged on the basis of the uniqueness of the work, the degree to which it fits the theme subjects of the Conference and the ability to portray the subject of the abstract in a poster/pictorial form for presentation at the Conference. Highly theoretical or mathematical subjects should be avoided, as they do not lend themselves to pictorial presentations.

Presentations: The students are invited to present their posters and will be reimbursed for a portion of their travel expenses. If they choose to present a poster, they cannot present a paper in the regular sessions. The students will post their posters in the designated area and will be by their posters at selected times so that they can interact with the Conference attendees. Some students will request outlets for computers or VCRs. It should be pointed out that a poster is a poster presentation of the work and not a laboratory demonstration. The idea is to be able to express in a few words and graphics a problem, a way of solving it and the results. A poster is not a thesis tacked on the wall. A copy of the poster presentation layout is given in Figure B2-1.

Poster Placement: It is important to locate the posters in an area where there will be traffic flow. If the posters are pushed off in a corner, they will not get the visibility that they deserve. Most conference centers are not equipped for poster sessions and it is important in the preparation to work with the conference center to make available mountings for the posters. The ideal mounting for a poster is a portable wall section such as used for office partitions. Easels with plywood/corkboard are the most likely things available. They work, but are not always uniform in size and they do not make a professional appearance. If the conference center is made aware of the need before the day of the Conference, they can make arrangements for uniform mounting surfaces.

Reimbursements: The Conference will provide the students a complimentary full registration to the Conference to include a copy of the Conference Proceedings. They will be reimbursed for a portion of travel and lodging expenses, up to a specified amount based on the conference budget and the number of students selected. The reimbursement will include transportation costs, lodging and some incidental expenses. The student will have to arrange their own travel and finance their own way to the Conference. They will be given expense forms to fill out at the Conference. They will need to submit receipts for travel and lodging with their expense forms.

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Poster Judging: A panel of judges should review each poster at the Conference and rate the presentations. At the final awards luncheon of the Conference, the winners of the poster competition should be announced and prizes awarded. The cost of the cash awards should be included in the poster budget.

Certificates: A certificate of participation should be prepared and given to each student poster participant. This recognition is important to the student and is beneficial for their resumes. Photographs should be taken and copies of the photographs should be sent to the students. Following the Conference, a letter should be sent to each faculty endorser acknowledging the participation of their student and thanking them for supporting the student to come to the Conference.

Publications: The poster papers should be submitted for publishing in the Conference Proceedings. Authors kits should be sent to each student along with the poster preparation guidelines. The winning student poster paper should be submitted to each sponsoring society for publication in other publications of that society.

Poster Program Budget: A budget typically for \$15,000 for the conduct and administration of the Student Poster program is to be included as a line item in the Conference budget. In preparing the budget the planners should estimate the cost of travel and lodging for 10 to 15 students. The budget should also include the prize awards and the administrative costs for printing and mailing the Call for Student Posters and other postage and support costs for the conduct of the program.

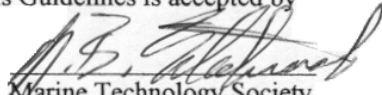
Tutorials and Papers: Some students may wish to attend a tutorial session. They are free to do so, but they must pay for the tutorial session out of their own pocket. They are free to attend and encouraged to attend all of the Conference papers sessions, exhibits and activities that do not conflict with the times for their attendance at their posters.

Conference Program: The Student Poster Program is a regular part of the Conference. As such, the poster titles and authors should be included in the Final Conference Program. The schedule of times for the students to be in attendance at their posters should also be included.

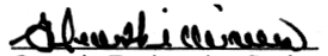
High School Participation: If there are local high schools near the location of the Conference, it is highly desirable to contact these schools to make them aware of the Conference and find out if they have Science Fair programs or some other student activity that might be presented at the Conference. If it is possible to organize a one-day visit by the local high schools to the Conference, this can be a worthwhile project. Money can be included in the Program budget to support this effort.

Publicity and Promotion: One of the hardest jobs is getting the word out to the students that there will be a Poster Program at the Conference. An announcement can be placed in the IEEE Potentials and the Poster Program needs to be announced in the Conference Call for Papers, in addition to the Call for Student Posters. The use of the Internet and the World Wide Web page is encouraged as all students have access to the Internet. Over the years, a list of schools have been developed that regularly supplies students for the Program. This list needs to be expended to encourage more participation in the Program.

This Guidelines is accepted by:


Marine Technology Society
Norman Estabrook
MTS President

Date: 8/15/99


Oceanic Engineering Society
Glen Williams
IEEE/OES President

Date: 8/15/99