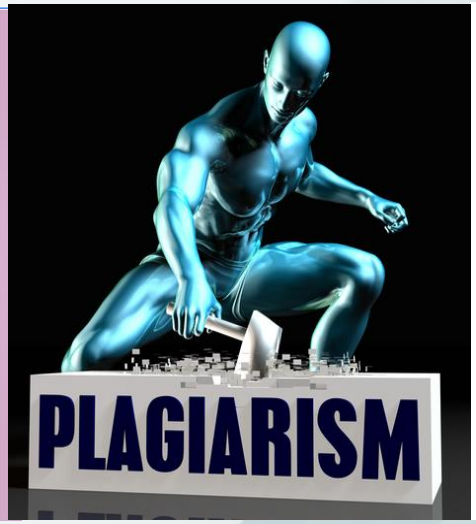


Conference Leadership Workshop

Managing the Technical Program – Best Practices

Dr. Sameer S. M.

4th March 2023

Region 10 AGM- Breakout Session

IEEE
Advancing Technology for Humanity

Agenda

- Managing the Technical Program
  - The Role of the Technical Program Chair
  - IEEE Scope
- Conference Sponsorship
  - Overview of the IEEE Sponsorship Types
  - Evaluating Opportunities Sponsorship
  - IEEE Scope
- Peer Review
- Similarity Check

Managing the Technical Program

The Technical Program Chair

Define the Scope of the Technical Program

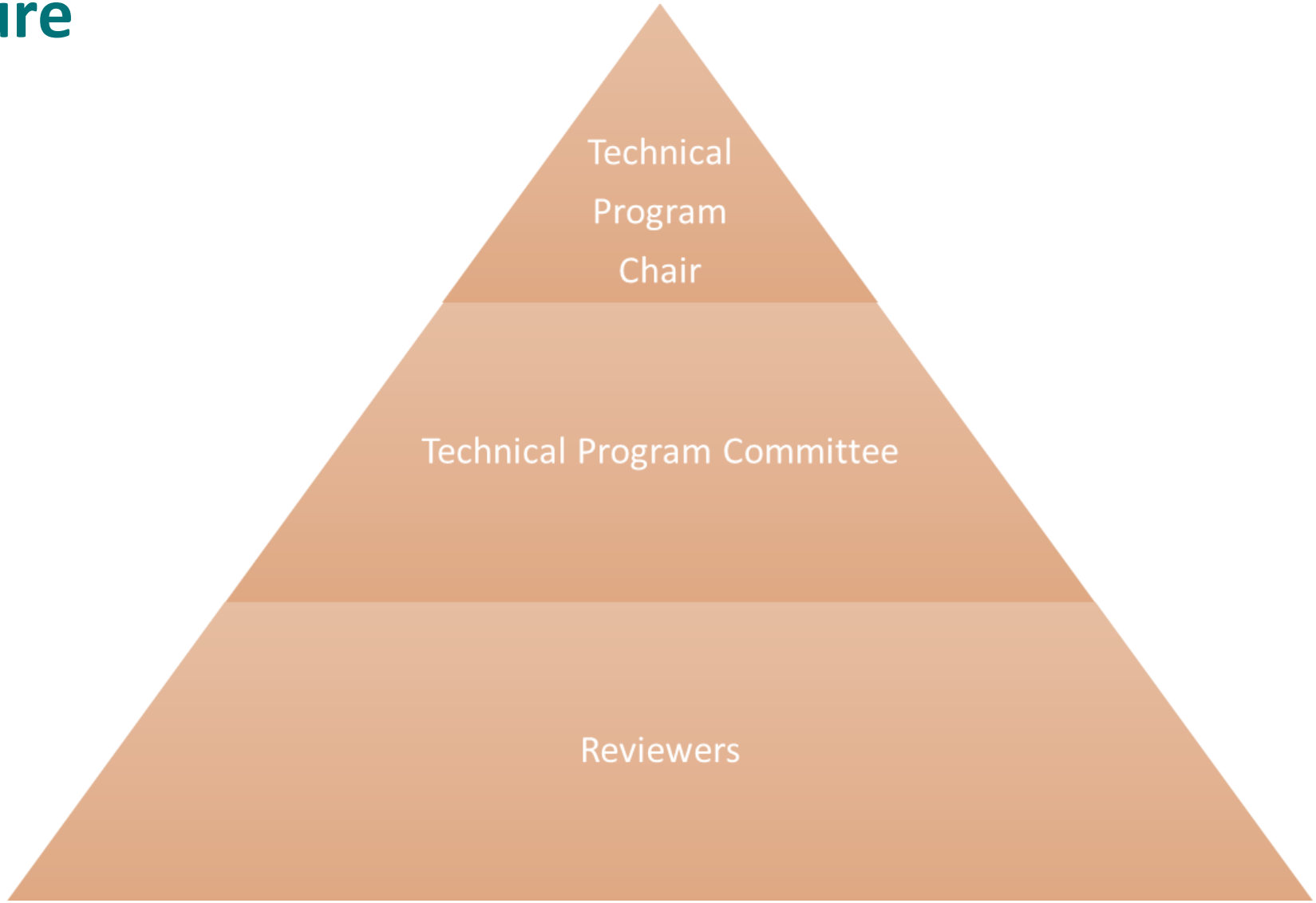
- Ensure a well-balanced, high-quality program is organized and presented
- Build your Conference Team
  - Recruiting/organizing/managing a Technical Program Committee and **peer reviewer team**
- The Technical Program Chair **manages the Call for Papers** through peer review and ultimate selection of every accepted paper
  - including non-presented paper and plagiarism policies
- Coordinates **scheduling** of session rooms and determining needs for the local arrangements of the program
- **Plagiarism Screening** – CrossCheck (now called Similarity Check)

The Technical Program Chair's Role

- Discuss key issues with the last Technical Program Chair
  - What challenges were encountered?
  - What peer review tool was used and was it effective?
  - Did you utilize CrossCheck for plagiarism screening?

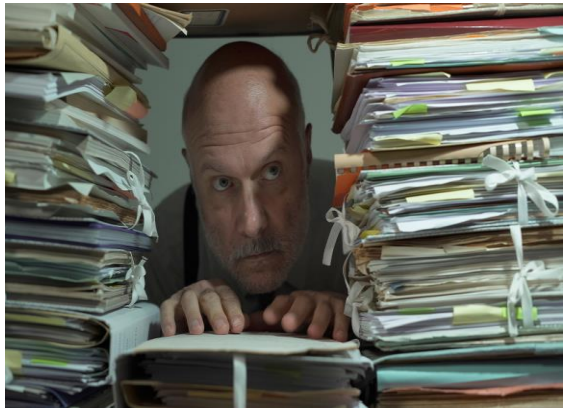
- Develop tracks when there are multiple, significant topics within the overarching conference scope
  - Assign a track chair if one is warranted
  - How many tracks did you have last year?

Structure

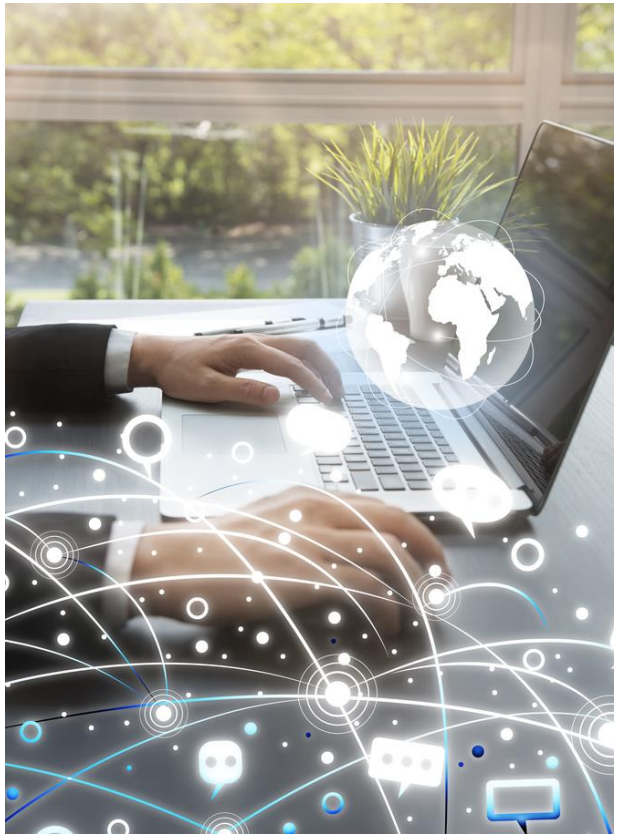

Technical
Program
Chair
Technical Program Committee
Reviewers

Technical Program

Peer Review Systems



- Select a Peer Review, paper management system
- Consider conference size and complexity
- Develop a non-presented paper policy
- Communicate the policy in the call-for-papers and author communications
- Make sure the IEEE sponsor (Section/Council/Chapter) is engaged in developing the technical program

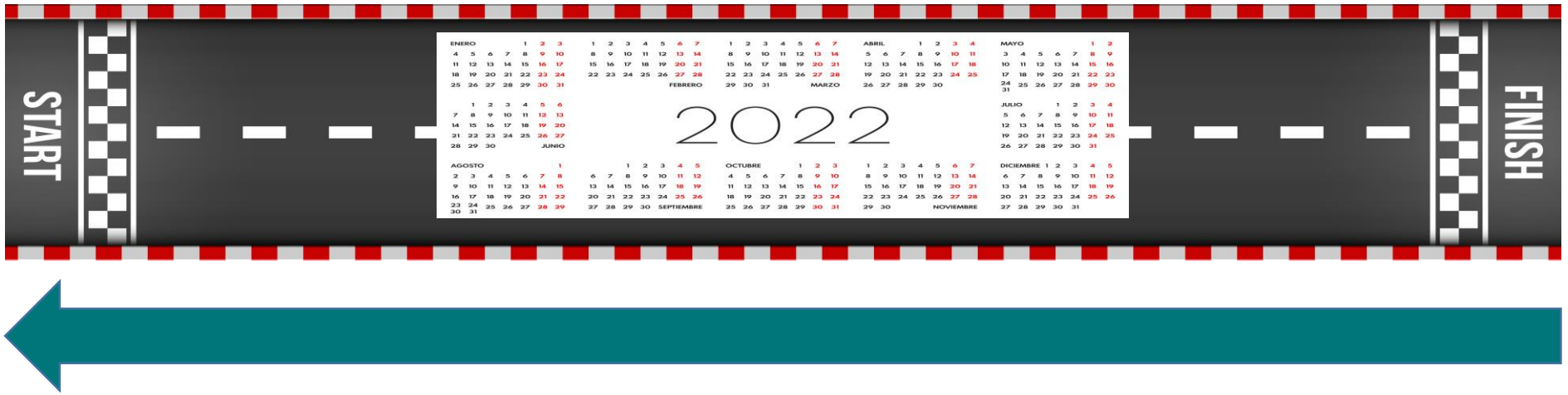


The Technical Program Timeline Communication Guidelines

Technical Program Timeline Development

Tip

- Develop the timeline for **submission and review**, by working in reverse from the conference start date



- Work with the conference organizing committee to ensure all parties are aligned

Conference Timeline

Differs based on the Size of Your Conference

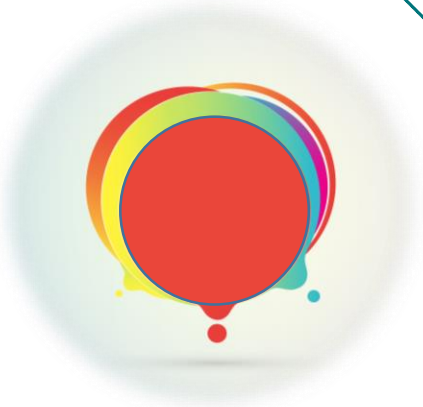
***Example is for a 200-person conference**

Communication Guidelines – Representing the IEEE Brand

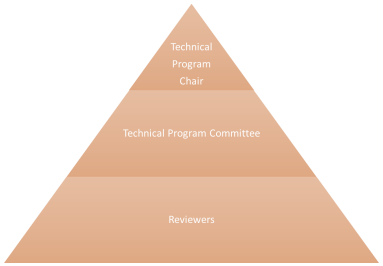
- Each conference is responsible for communicating IEEE policies in the “Call for Papers”, conference web site and conference communications
- **Conferences can not guarantee inclusion in the IEEE *Xplore*® Digital Library or indexing**
- IEEE cannot guarantee entries are included in any particular database
  - IEEE abstracting and indexing partners (such as Elsevier) make their own editorial decisions on what content to index
- **It is preferred that the conference indicate that the proceedings will be "submitted for" publication in IEEE *Xplore*® and indexing**

IEEE Scope

Conference Scope



- IEEE is a technical publisher - readers look for work in IEEE's technical areas
  - Each Society and Technical Council has a Field of Interest
  - Full listing: https://ta.ieee.org/operations/governing-documents
  - Additional guidance can be found in the "Aims and Scope" of IEEE Journals, found on each journal's page on *Xplore*
- Conference attendees expect content in the scope of the conference
- **The conference's reviewers must be expert in the subject area of each paper they review**
  - Reviewer pools are developed for the scope of the conference
  - With a wide range of science disciplines included in your conference scope do you have enough reviewers for so many different topics?



How Content is Categorized in IEEE *Xplore* - Suitability

- Aerospace
- Bioengineering
- Communication, Networking & Broadcasting
- Components, Circuits, Devices & Systems
- Computing & Processing (hardware/software)
- Engineered Materials, Dielectrics & Plasma
- Engineering Profession
- General Topics for Engineers (Math, Science & Engineering)
- Geoscience
- Nuclear Engineering
- Photonics & Electo-Optics
- Power, Energy Industry Applications
- Robotics & Control Systems
- Signal Processing & Analysis
- Transportation
- Fields, Waves & Electromagnetics

Sponsorship Opportunities

Conference Sponsorship

Types of Sponsorship

- **IEEE Conferences must be Sponsored by at least one IEEE OU**
- **Sole Sponsorship**
  - **Entire OU** involvement in the Conference
  - Responsible for technical, financial, publicity and administrative aspects of conference
  - OU will receive surplus or be liable for any deficit
  - IEEE owns conference name, slogan, copyright for publications, Internet domain and logo

- **Financial Co-Sponsorship**
  - **Shared** involvement among several organizations **with at least one IEEE OU**
    - Other possible co-sponsors: IEEE OUs, and Not for Profit non-IEEE organizations
  - Shared responsibility for the technical, financial, publicity, and administrative aspects of conference
  - OU will receive surplus or be liable for any deficit
  - OUs provided option for no cost exhibit booth, table, or other means of promoting IEEE membership and activities

There are no TCS fees associated with Financially Sponsored Conferences

Conference Sponsorship

Types of Sponsorship

Technical Co-Sponsorship of a non-IEEE Conference

- IEEE OU has **NO financial involvement** in the conference
- **IEEE OU is responsible for the technical program**
  - Ensure that only high quality and appropriate scope is included
- IEEE OU should encourage members to submit papers and attend the conference
- Relationship between sponsoring organizations will be defined in a Memorandum of Understanding (MOU)
- **Technical co-sponsorship does not guarantee that the papers accepted for presentation at the conference will be eligible for inclusion in the IEEE Conference Publications Program (CPP)**
- The non-IEEE organization shall provide the IEEE organizational unit with the option of a no cost exhibit booth, exhibit table or other means of promoting IEEE membership and activities during the conference

IEEE

TCS Fee Overview and Background

- A Technical Co-Sponsor (TCS) is an organization which has no financial stake in the conference but has a significant role in the technical program. There is NO IEEE financial interest.
- IEEE TCS conferences can provide a way for conference papers to be considered for publication in IEEE *Xplore*.
- MGA: For any technically co-sponsored conference in which there is no (0%) IEEE financial interest the MGA co-sponsor shall arrange (via an approved MoU) for recovery of IEEE operation costs in the form of TCS fees.
  - For conferences for which the creation of the MoU starts after 1 January 2023, the fees are $1450 per event (TCS Fee) plus $22 for each paper.
  - As an exception to this general policy, MGA will continue to pay those fees if the external (non-IEEE) financial sponsor has a National Society Agreement with IEEE or has a Sister Society Agreement with one or more of the IEEE Societies.

IEEE

The Goals of a Successful Technically Co-sponsored Conference

- IEEE Organizational Units (OU) build communities to
  - Increase membership
  - Increased networking opportunities
  - Provides an opportunity for your membership to publish their work

- The OU helps develop a high-quality technical program and potentially migrate TCS conferences into financially sponsored conference
- **A critical goal is to execute a high-quality technical program via managing the peer review process**
- IEEE OU members become involved in conferences, gain valuable experiences

- **Support conference for niche markets or communities that the IEEE OUs are not currently serving**

Ensure the Success of your Technically Co-sponsored Conference

Considerations

- Does the program align with your community's needs
- **Only partner with sponsors that are aligned on goals, especially quality**
- OU leaders or designees must participate in the conference
  - Provide post conference assessment
- If Conference Scope > IEEE Scope
  - Only submit papers within IEEE scope for inclusion in *Xplore*
- Understand the history of the conference

For **Chapter** sponsored events, the **Section** is responsible
The Chapter's Society/Councils are not involved in vetting

Evaluate all Sponsorship Opportunities

Vetting Summary

- **Evaluate the conference history, the organizer/s, statistics**
  - Review past proceeding for quality and scope
  - Read papers – are there errors, is English understandable?
  - Research Organizers
  - Do you see too many papers presented in one day for a proper technical program?
  - Was there enough time for quality peer review period take place? Review conference statistics
  - Have your members attended in past years?
- **If there are concerns, the IEEE OU can say "No, Thank You" we are not interested in sponsoring this conference.**
  - You don't have to detail why, you can note the IEEE high quality standards
- **Many conference want the IEEE brand associated with their conference as it brings instant credibility to their conference – our role is to protect the IEEE brand**

For Profit Business Participation IEEE Conferences

*Sole Sponsorship & Co-Sponsorship – **For Profit Business** **can not** participate in a surplus or deficit nor the management of the conference*

Can contribute funds in exchange for brand exposure

Naming Convention

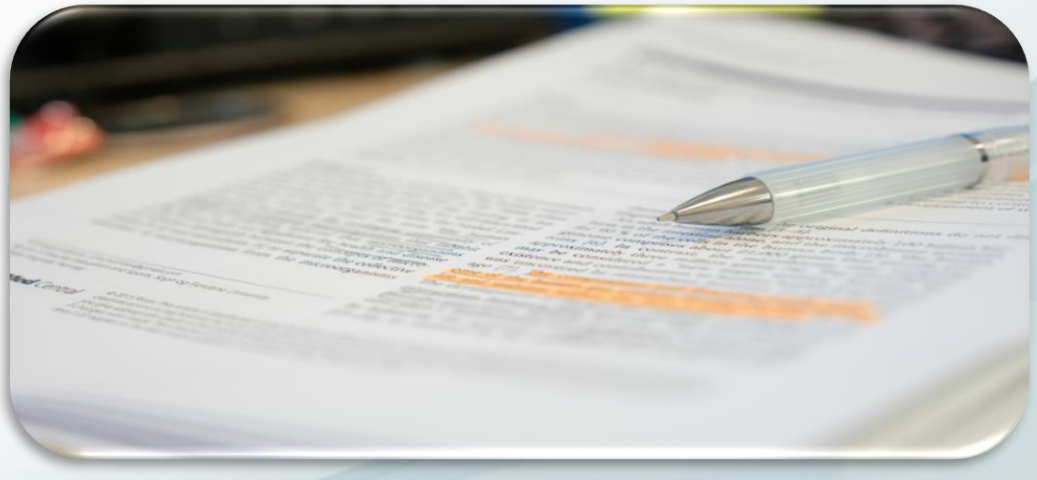
Contributor
Patron
Supporter
Sponsor

Sponsor a Lunch, Tea, Dinner, provide branded trinkets

For marketing purposes, websites, collateral, flyer etc.

IEEE

How to Conduct the Peer Review Process

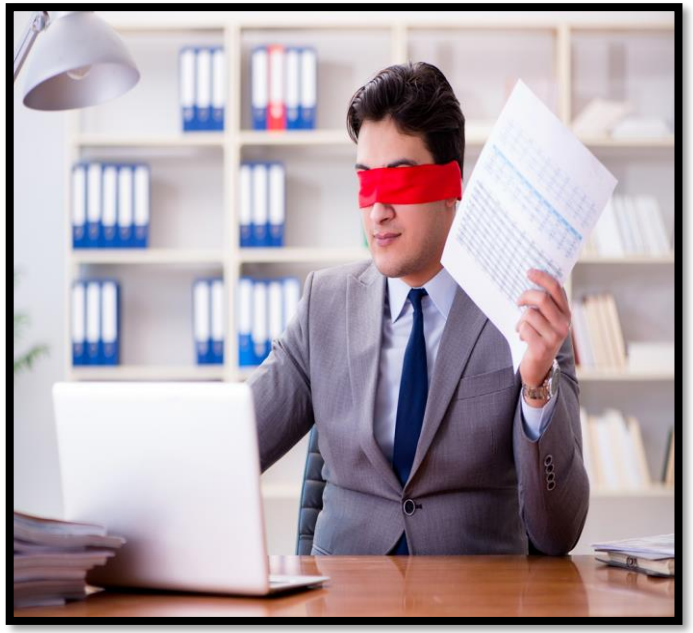


What is Peer Review ?

- The process of evaluating a scholarly work by a group of experts in the same field to make sure it meets the necessary standards before it is accepted or published.

Common Types of the Review Process

- Blind Review (Single Blind) Most Common
  - Reviewers' names are hidden from the author
- Double Blind
  - Reviewers' names are hidden from the author and author's names are unknown to the reviewers
  - The double-blind review process is intended to prevent bias (or the perception of bias) towards any author



IEEE

Ongoing Challenges in Reviews

Critical role for the sponsoring OU!

- Receiving enough high-quality papers by the submission deadline
- **Finding enough experts to provide quality reviews by the deadline**
  - Expert in the subject of the papers
  - Consider prior year authors
  - Qualified students can serve as reviewers
- Managing conflict of interest.
  - Reviewers should recuse themselves from conducting a review if they interact closely with any of the authors or if any authors are from the same institution

Sizing Your Peer Review Team

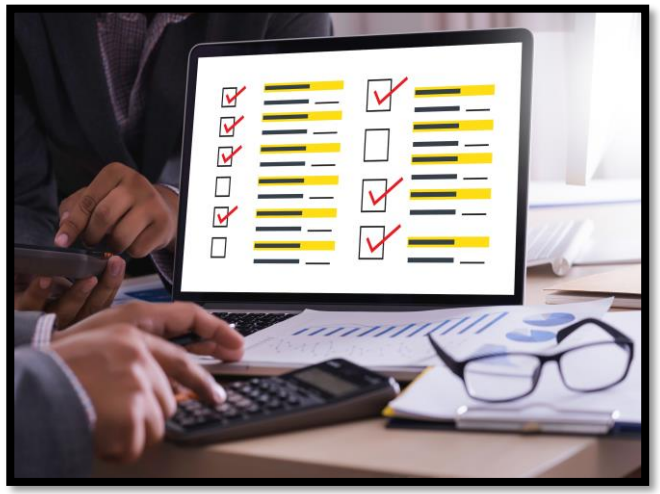
- Determine the number of reviewers required based on:
  - Expected number of papers submitted
  - **Three reviews per paper (3)**
  - Define the maximum number of papers per reviewer
    - Suggested max.: 12 full papers - maximum per reviewer
    - At least 4-week review time period
- Example:
  - Anticipated full paper submissions = 200
  - Reviews per paper = 3
  - Total reviews = 600
  - Full papers per reviewer = 12
  - **Number reviewers needed = 50**
- Review previous conference history

Diversity of Reviewers

- Gender
- Age
- Heritage
- Geography
- Industry/Academic

Your goal is to have the reviewer pool reflect all those who may submit a paper, including expertise.

Peer Review Process



- The Technical Program Chair manages this process
  - Selects Paper Management System
- Papers are organized by topical areas
  - Match topics with reviewers' expertise
- Paper assignments are managed within a peer review system (same as paper management system)
  - Reviewers provide feedback to authors
  - Reviewers ultimately provide a final score for the paper and send it back to the Technical Program Committee (TPC)
- TP Chair monitors and communicates number of accepted papers / acceptance rates to the Conference Chair through out the process

Privacy: Reviewers Responsibilities

- Participants in the review process (i.e., referees and anyone else who is authorized to handle conference submissions) **shall treat the contents of conference submissions under review as confidential information not to be disclosed to others before publication**
- No one with access to a submission shall make any inappropriate use of the special knowledge that access provides

IEEE Publication Services and Products Board Operations Manual 2019

Conference Publications Policy: PSPB Operations Manual – 8.2.2.B (page 99)

Reviewer Questions

EXAMPLE: Paper Scoring Feedback

Result 1

Relevance to the conference	7	Technical strength	4
Originality	6	English writing	4
Overall	**5**		

Comment

This paper mainly shows us the test result of SVM (support vector machines) method, which is a new type of learning method based on statistical learning theory, for transient stability analysis of power systems. The result of the test has proved the superiority of the SVM method and more needs to be done to perfect this method.

The test program needs to be enriched based on the test result gathered. From the result of two tests we can see that in small scale of training and testing, the performance is perfect while in large scale test faults appeared. In this case, staged experiments needed to be conducted to find out the critical point of the test number and get to know the reason of fault appearance.

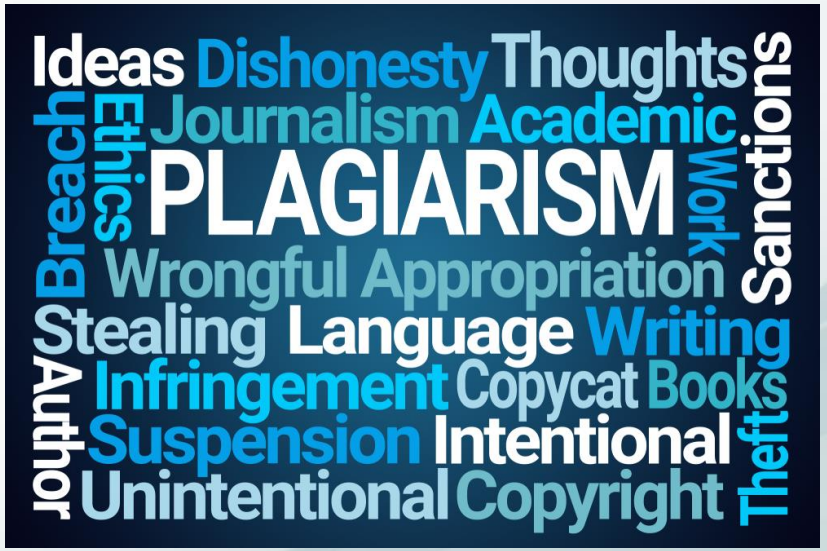
This is a good start for this kind of method, but more needs to be done to perfect this algorithm.

- Relevance to conference **(scope)**
- **Novelty**: is this original material distinct from previous publications?
- **Advancement**: is this a significant contribution to the field?
- Validity: is the study well designed?
- Data: interpreted and analyzed correctly?
- Clarity: are the ideas expressed clearly, concisely, and logically?
- Compliance: are all ethical and conference requirements met?
- Reviewers Confidence Score - on a scale
  - Highest level: direct expert knowledge
  - Lowest level: general familiarity

Peer Review Process

- Considerations during process
  - Do I have enough submissions?
    - If No, do I need more promotion?
  - Do I have an adequate number of accepted papers?
- TP Committee validates that all reviews have occurred and develops three groupings of papers
  - Reject
  - Accept
  - **Maybe Accept**

Similarity Screening



The Technical Program Chair Manages the Peer Review Process

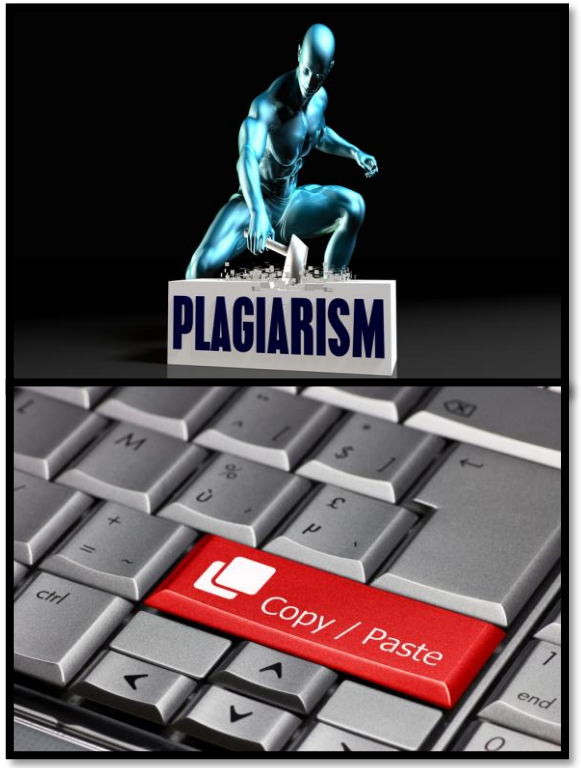
- Ensure a well-balanced, high-quality program is organized and presented

- **Plagiarism Screening – Similarity Check (new name for Crosscheck, being rebranded in 2022)**
  - **This is NOT a part of, or a substitute for, the Peer Review process!**
  - **Technical Program Chair should appoint dedicated person/people to handle the plagiarism screening process.**

IEEE

Plagiarism and Similarity

- IEEE defines plagiarism as the reuse of someone else's prior ideas, processes, results, or words without explicitly acknowledging the original author and source
  - It is a serious breach of professional conduct, with potentially severe ethical and legal consequences
- IEEE prohibits republication of substantially the same material, **even by the same author(s)**



- IEEE requires that all content be screened for possible plagiarism or republication
- IEEE provides all Publication Editors and Technical Program Chairs free access to Similarity Check, a premier plagiarism detection tool

IEEE

CrossCheck-Re-Branded to Similarity Check in 2022

- **CrossCheck** is now called **Similarity Check**
  - It is exactly the same tool, powered by iThenticate!
- Superior to other tools
  - Accesses the largest publishing databases
- Primarily detects similarity
- **CLE: Cross Check for Conferences – in Chinese and English !**
  - https://ieee-elearning.org/CLE/course/view.php?id=223
- **CLE: Strategic Approach to Plagiarism Screening – Excellent module for designated person managing plagiarism screening**
  - https://ieee-elearning.org/CLE/course/view.php?id=435

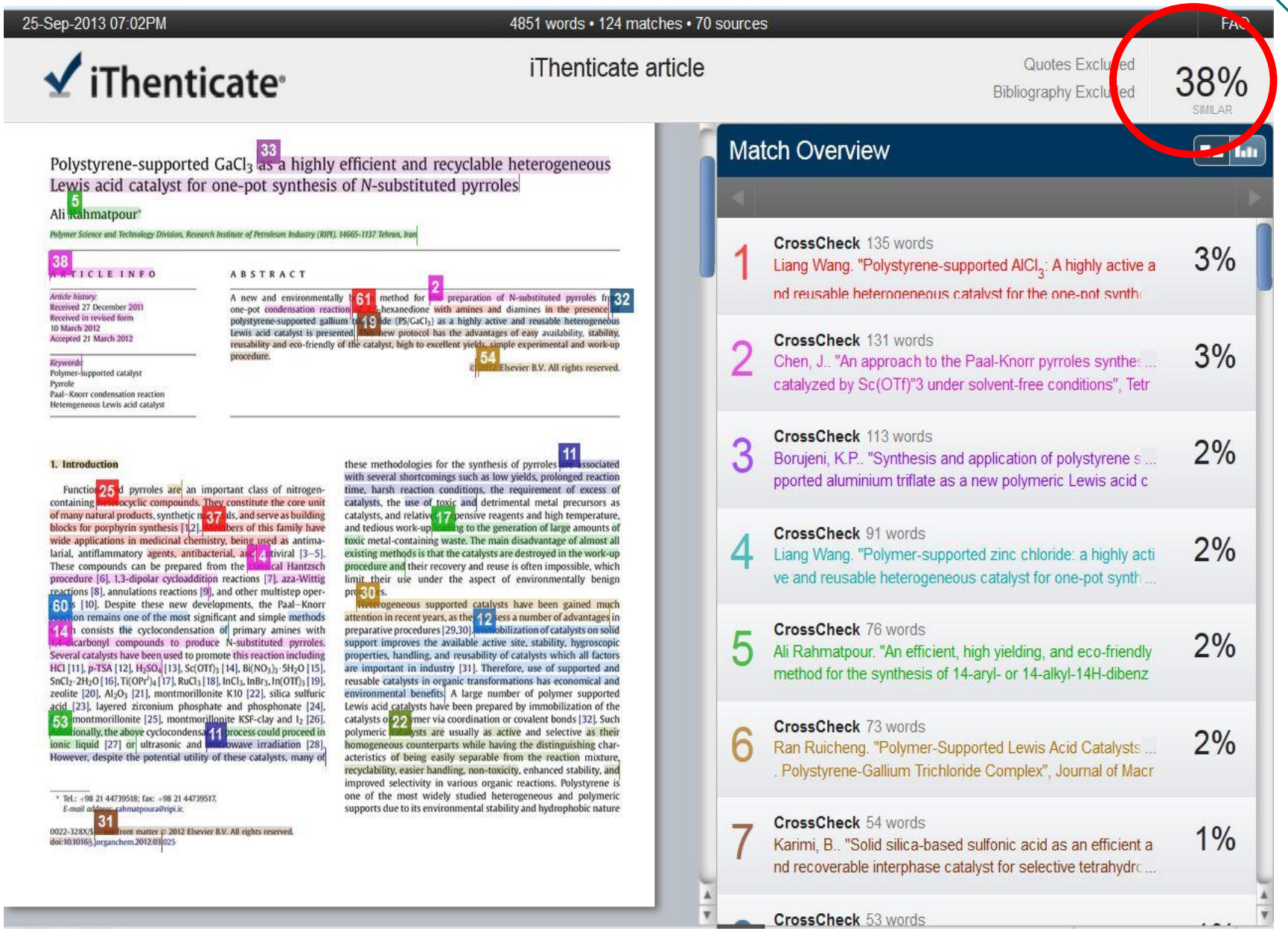
IEEE

Similarity Check

Sample Similarity Report

Assign resources to assist the Technical Program Chair if necessary – the reports requires a human eye to review and judge.

Each accepted paper must be screened for plagiarism



Similarity Check is Not Peer Review

Requires Interpretation

- The Technical Program Chair manages Similarity Check and plagiarism reviews
  - needs coordination with Publications Chair
- Similarity Check does not replace the peer review process
  - Similarity screening is a separate function from the peer review process
- Subject matter experts must separately review the paper to determine suitability, novelty, quality and communication
- **Similarity scores are just that, they require human review and analysis**
- Similarity scores should not be the only basis for reject (or accept) decisions
  - Similarity score should not be given as feedback to authors
- Similarity Check can be used on IEEE-copyrighted content only

Similarity Check – When to use it?

- Similarity Check must be separate from the Peer Review process

- Options
  - Screen all papers before peer review
  - Screen accepted papers immediately after peer review
  - Screen papers in parallel with peer review (not ideal)
  - Screen papers after the conference (only as a last resort)

THANK YOU !