

## Notes from ISIT 2008 Organizers

**Frank Kschischang, En-hui Yang, General Co-Chairs**  
**Wei Yu, Finance, Ravi Adve, Teng Joon Lim, Local Arrangement**

IEEE ISIT 2008 was held in Toronto, Canada, from July 6 to July 11, 2008. The planning began three years prior with the proposal and an initial budget presented at the BoG meeting in Adelaide ISIT 2005. The following is a summary of our experience in organizing the event, which may be useful to future organizers of ISITs.

### 1. IEEE Guidelines

We consulted the IEEE Conference Organization Manual extensively throughout our experience (available at: <http://www.ieee.org/web/conferences/mom>.) The manual contains IEEE policies and procedures regarding conference organization, which we found to be quite useful. All contracts exceeding US\$25,000 require IEEE approval. In our case, hotel, conference management, and audio/visual contracts were approved by IEEE.

Vita Feuerstein (732) 562-6826 [vita@ieee.org](mailto:vita@ieee.org) helped us with contracts.

Smita Desai (732) 562-3867 [s.desai@ieee.org](mailto:s.desai@ieee.org) helped us with finance.

### 2. Hotel Contract

We chose Sheraton Centre Toronto mainly for its convenient location in downtown Toronto. The main points of hotel contract negotiation are: (a) room rates; (b) room commitments; (c) space rental; (d) food and beverage commitment and rates. The hotel was willing to tradeoff among these factors. The hotel contract had to be in place about three years in advance in order to secure meeting space availability. Because of the uncertainty in forecasting registration numbers far in advance, we chose to minimize our variance and agreed to a meeting space rental of C\$20,000, food and beverage commitment of C\$100,000 (with 15% allowable attrition, i.e. effectively C\$85,000), in exchange for a lower room rate C\$210/night, and a lower room commitment (1555 in total with 20% allowable attrition, i.e. effectively 1224 room-nights.)

A comparable figure we had at the time was the Marriott Hotel contract for Chicago ISIT 2004, where the room commitment was 1357 with 15% attrition, with \$0 meeting room rental, and US\$179/night. Given exchange rate at the time (C\$1 = US\$0.85), and factoring in inflation, we felt that the contract terms were acceptable.

At the time of hotel contract negotiation, we had already decided to hold the welcome reception and awards luncheon at the Hotel. These two events plus the coffee break would easily meet our food and beverage obligation. We could have committed to hold the banquet at the hotel as well, in which case we might have been able to further

negotiate a reduction in meeting space rental fee. At the end, our actual total food and beverage spending was C\$215,649.66.

Canadian dollars appreciated to US\$1 = C\$1 by 2008, which caused us considerable worry on hotel pick up. However, at the end, our final hotel pick-up number was 2005 room-nights, which far exceeded our commitment.

17-Apr-08	300
21-Apr-08	341
25-Apr-08	400
2-May-08	528
12-May-08	689
21-May-08	817
23-May-08	918
26-May-08	1129
28-May-08	1267
30-May-08	1267
2-Jun-08	1334
6-Jun-08	1426
13-Jun-08	1515
20-Jun-08	1594
25-Jun-08	1590
27-Jun-08	1571
4-Jul-08	1570
Final in-block room-nights	1553
Room-nights outside of the block	452
TOTAL	2005

Note that the hotel block cut-off date was June 11, 2008. Advance registration deadline was May 15, 2008.

A main reason for exceeding the hotel room commitment was that Sheraton Hotel ran a summer promotion of C\$139/night for about 2 weeks in late May. In addition, many online travel websites also offered special rates, well below the C\$210/night posted rate. (The best priceline.com rate appeared to be less than US\$100.) These special rates were typically non-refundable, non-changeable. Our hotel contract stipulated that booking outside of the room blocks can be counted toward the group commitment. We took the steps to advertise these special rates in our conference website. At least 25% of our bookings were outside of the block.

It appeared that a large number of our members preferred to stay at the conference hotel. Around US \$200/night was perceived to be reasonable for the convenience.

As incentive for fulfilling the room commitment, the Hotel provided a number of free rooms (including a Royal Suite, which we gave to the Shannon Lecturer), a number of

staff rooms at reduced rate, and a number of free upgrades, which we distributed to plenary speakers, IT society office holders, CMS staff, and local organizers.

A few lessons learned:

- Session rooms and the plenary hall should be reserved for 24 hours, and not 8am-6pm, as otherwise, the A/V equipment may have to be taken away and stored somewhere else overnight, if the rooms are rented out to a different group by the Hotel.
- It takes about a day to set up the A/V equipment in the plenary hall.
- Time needed to set up tables for award luncheon and banquet needs to be taken into account, if the same room is also used for sessions.

### **3. Insurance**

IEEE provides blanket liability insurance policy to all conferences at no extra cost. The conference has to submit a “Request for insurance” form.

IEEE recommends event cancellation insurance in addition (e.g. against airline strikes, travel advisory, terrorism.) The cost of insurance depends on conference budget. The cost to ISIT 2008 was US\$3,768.57, which included coverage on “full terrorism with threat”. The insurance policy was negotiable. For example, our policy initially did not cover the risk of travel advisory against avian flu. We negotiated to include avian flu coverage at no additional cost.

Karyn Conner [k.conner@ieee.org](mailto:k.conner@ieee.org) helped us with arranging the insurance.

### **4. Bank Accounts**

Most of our expenditures were in food and beverages and in local arrangements, which were in local currency. To avoid exposure to currency fluctuation, we chose to charge registration fees in Canadian dollars. We opened both USD and CAN bank accounts at a local bank: *TD Canada Trust*. IEEE Concentration Banking was not used.

The account name is “IEEE o/a ISIT 2008”. The signing authorities are: Frank Kschischang, En-hui Yang (general co-chairs), Wei Yu (finance), and Mr. Thomas Lynch from IEEE (per IEEE regulations.) We chose to require two signatures for any transactions in amounts > C\$5,000. In addition, the Finance Chair used a dedicated credit card to pay for some of the conference invoices.

### **5. Conference Management Services**

We retained the services of CMS (contact: Billene Mercer [mercerc@cmsworldwide.com](mailto:mercerc@cmsworldwide.com), (979) 846-6800, based in Texas, USA) to collect registration fees, provide on-site registration staff, manage paper handling (including master copies of the Final Program, Book of Abstracts, and the CD image). The total fees are US\$32,382.12, plus staff travel

expenses of US\$3,768.57. Three registration staff members were on site during the ISIT week.

CMS provided outstanding services. Our contact at CMS Lance Cotton was always very responsive. He was meticulous in handling the registration process. We highly recommend future ISITs to use them again.

## 6. Credit Card Processing

CMS would normally handle credit processing on behalf of the conference, and deposit the collected registration fees in an escrow account. However, CMS is only able to handle U.S. dollars. Because we chose to collect registration fees in Canadian dollars, we had to use a Canadian credit card processing company, and open a merchant service account ourselves. We used *Beanstream Electronic Payment Process*, based in Victoria, BC. Lance Cotton at CMS interfaced their registration website directly with the Beanstream system.

Beanstream charges \$0.25 per transaction plus, 2.8% for Visa and MasterCard transactions and 4.1% for American Express cards. The funds are transferred to our Canadian dollar account at TD bank (through a merchant service account) within 2-3 days.

A number of people reported trouble registering for ISIT using valid credit cards from Iran. The problem appeared to be their Iranian address.

## 7. Registration

Based on historical ISIT attendance data, we projected our total attendance at ISIT 2008 to be 820. The final figure was 849, which exceeded our forecast.

ISIT Attendance	2004		2005		2006		2007		2008	
	Chicago	USD	Adelaide	AUD	Seattle	USD	Nice	EUR	Toronto	CAN
In Advance - IEEE Members	307	\$ 475	267	\$850	354	\$575	368	€565	343	\$ 675
In Advance - Nonmembers	59	\$ 550	64	\$1100	58	\$700	54	€660	46	\$ 825
In Advance - IEEE Member Reduced	291	\$ 225	177	\$425	291	\$250	290	€310	242	\$ 375
In Advance - Nonmember Reduced									57	\$ 450
After 15 May - Members	81	\$ 550	70	\$1100	64	\$675	37	€650	68	\$ 775
After 15 May - Nonmembers	14	\$ 650	27	\$1350	13	\$800	12	€780	13	\$ 925
After 15 May - IEEE Members Reduced	56	\$ 275	25	\$550	30	\$325	26	€370	47	\$ 425
After 15 May - Nonmember Reduced									20	\$ 500
Registration Waivers	17		20		0		4		13	
<b>Total FULL</b>	<b>461</b>		<b>428</b>		<b>489</b>		<b>471</b>		<b>470</b>	
<b>Total Reduced</b>	<b>347</b>		<b>202</b>		<b>321</b>		<b>316</b>		<b>366</b>	
<b>TOTAL</b>	<b>825</b>		<b>650</b>		<b>810</b>		<b>791</b>		<b>849</b>	

The total registration number was 688 at seven weeks prior to the opening of the conference (advance rate cut-off), and 757 at three weeks prior. We were surprised that a large number of people (approx. 80) registered on site.

Our registration fees were comparable to past U.S. based ISIT's at the "nominal" Canadian dollar exchange rate of C\$1=US\$0.80. We did not anticipate the rapid appreciation of Canadian dollar at the end of 2007, which made ISIT 2008 relatively expensive to U.S. participants. Our registration fees were considerably lower than past ISIT's outside of U.S.

The conference provided complimentary registrations to the Shannon Lecturer, the recipients of Wyner Service Award (according to the IT Soc by-law), and Nela Rybowicz of IEEE Transactions.

## **8. Visa**

At least 4 students from Iran, 1 student from India, and 1 (foreign) student from U.S. were denied Canadian visas for attending the ISIT. We refunded their registration fees.

The visa invitation letters were issued by the conference general co-chairs manually. We recommend future ISITs to include an automatic generation of visa invitation letters as a part of the registration process, e.g. a PDF file could be emailed to the general co-chairs, to be signed and sent by postal mail.

## **9. Sponsorship and Student Travel Grants**

The conference organizers solicited and received the following government and industrial sponsorships:

- C\$15,000 from Research-in-Motion (RIM)
- C\$5,000 from Ontario Centre of Excellence (OCE)
- US \$4,000 from IBM Research
- US \$2,000 from Microsoft
- US \$10,000 from U.S. National Science Foundation (NSF)

We acknowledged the first four sponsors in conference banner, publications, and website. We gave complimentary conference registration to two members of technical staff from RIM and two representatives of OCE. We were unable to acknowledge the NSF support, because the NSF funds were not confirmed until August 2008, well after the conclusion of the conference.

The conference used the sponsorship funds to provide student travel grants. The RIM, OCE, IBM and Microsoft funds were handled by the conference directly. The NSF funds were handled by IEEE. Students had to submit their travel receipts to IEEE to seek reimbursement after the conference. Note that NSF funding is restricted to students in U.S. universities.

The delay in the approval of NSF sponsorship caused us considerable inconvenience. Greg Wornell was our NSF liaison for ISIT 2008. Our initial application was returned for the following reason (in words of Sirin Tekinay):

*“NSF provides travel support primarily for purposes of encouraging participation of those who otherwise would not. That there will be ‘no discrimination’ based on gender, age, and other types of groups, is not sufficient, I’m afraid. We want to see the selection process by which the travel support funds will be disseminated. In this process, we want to see women and underrepresented groups favored.”*

A subsequent revision of the application was eventually accepted.

Because of the uncertainty in NSF funding, Ron Kerr, who was in charge of student travel grant selection, set the grant amounts under the assumption that no NSF money would arrive. The grant amount is primarily a function of the expected travel cost to Toronto. They range from C\$200-C\$400. Students were asked to provide a letter from their supervisor stating that no alternative funding was available. All students meeting the criterion were accommodated. Post-doc’s and professors did not receive travel grants.

One of our sponsors, IBM, asked to be involved in the student selection process, which we accommodated.

Considering the possibility that NSF funds could eventually materialize, we separated all recipients into an NSF-eligible group and an NSF-ineligible group. The NSF-ineligible group received a Canadian dollar bank draft at the conference. We made special arrangement with a local bank so that they can cash the draft while in Toronto using their passports as identification. (Normally, a bank would only cash cheques for their own customers.)

The NSF-eligible group was told to wait until August to find out whether they should submit their receipts to IEEE (in case NSF funds arrive) or to the conference (if otherwise.)

In total, 45 students received bank drafts at the conference, 20 students received NSF grants. In addition, 4 students received registration fee waiver in lieu of travel grant. Thus, we supported 69 students for a total of about \$26,000.

Because we did not take NSF funding into account when distributing the student travel grant, the eventual arrival of NSF funding had an effect of increasing the conference surplus by \$10,000.

## **10. Plenary and Tutorial Speakers**

Each plenary speaker received an honorarium of US\$800. Those within the IT community received a free hotel room upgrade if staying at the Sheraton. Those outside

the community received a free upgraded Sheraton room, paid for by the Symposium, as well as complementary conference registration.

IEEE requires U.S. I.R.S. W-9 forms to be filled out by all who received more than US\$600 in a calendar year. IEEE issues 1099 forms at the year end to the beneficiary.

One of the outside-of-community plenary speakers, who is a U.S. government employee, declined the honorarium and free hotel room, citing government ethics regulations. We reimbursed his travel cost instead. The other outside-of-community speaker later submitted his travel receipts. His effective honorarium becomes less than \$600, for which a 1099 form was not required.

Each tutorial speaker received an honorarium of US\$500. (The fees were paid per speaker, not per tutorial.)

## **11. Final Program and CD Production**

CMS helped us produce the master copy of the Final Program, the Book of Abstracts, and the CD-ROM. At the recommendation of CMS, we used a company *Quebecor World* for the production of the final program and the abstracts, and a local company for CDs. The final program and the book of abstracts cost only about US\$8 per registrant, including shipping; the CD costs about C\$1 per CD -- much cheaper than we expected.

However, we ran into shipping delays for the final program and the abstract. This was partly due to the fact that the production facility of Quebecor World was located in Boston; the shipping process involves a change of trucking companies at the border. We did not have a good experience dealing with the transportation company *Manitoulin Transport*. We recommend future ISITs to use local printing companies whenever possible.

## **12. Other Printing**

The design and printing of the main banquet hall banner, directional signs, session programs, menus and the awards brochure need to be anticipated. We designed all these ourselves, and outsourced the printing to two local companies as well as the Sheraton's business centre. We found the business centre to be very accommodating and reasonably priced, because they wanted to project a good image. Last-minute photocopying of extra registration forms was done without complaint, for instance. It also provided crucial advice on such details as where to place signs and how large they should be because hotel staff were accustomed to preparing for events in that venue.

## **13. Audio/Visual**

We obtained three quotes for the A/V contract and used the one with lowest bid. The hotel in-house supplier was the most expensive. The supplier also videotaped the plenary talks (with the permission from the lecturers) at an additional cost.

The A/V company provided one laptop per room. An extra set of equipment was available on standby in case of equipment failure. One support staff from the A/V company was on site all day. There was one request for a transparency projector during the technical session, which was accommodated.

We were asked to videotape the student committee panel discussion. One of the organizers lent his personal video recorder for this purpose.

A student from the University of Toronto served as the official photographer at the reception, awards luncheon, and banquet.

#### **14. Food and Beverages**

Arranging the food and beverage was easily the most time consuming part of “local arrangements”. Our initial goal was to provide choice in Luncheon and Banquet menu, but that turned out to be too hard and/or expensive without having numbers a priori – the menu choices also became a source of confusions and misunderstandings. For future conferences, we would recommend listing the available choices (including dietary restrictions, such as Halal or Kosher meal) in the registration form itself so the organizers will have the correct numbers and preferences ahead of time.

To stay within budget and to not have to waste, we were quite conservative in ordering coffee, beverages and food. We ordered coffee, drinks and food for about 2/3 of the attendees and replenished only as needed. For example, we had 550 coffees, 400 juices and 65 dozen muffins early Monday morning and 300 coffees and 150 juices late Monday morning. Similarly, we had 550 orders of mixed drinks, coffee and snacks on Monday afternoon. While there was very little, if any wastage, we did not hear any complaints about lack of adequate supplies. Similarly, we paid for 822 lunches (awards luncheon) and 823 banquet dinners. While almost all registrants attended the luncheon, we estimate that about 60 registrants did not attend the banquet. These numbers were made up by 35 guests of registrants (who paid extra).

#### **15. Attendee Gifts and T-shirts**

Ordering gifts turned out to be fairly easy once we had settled on our budget and what to get. In the final package we handed each attendee a shoulder bag, a 4-in-1 pen (laser pointer, a pen, an LED and a stylus), a writing pad and an all-steel coffee mug. Other than the writing pad, all gifts had the conference logo (bag, mug) or the name of the conference (pen). All gifts together cost approx C\$21 per person. In addition, T-shirts were ordered for student committee activities.

We had ordered at least 50 extra of each beyond the estimated registration numbers, which turned out to be handy given the greater-than-expected on-site registrations.

The biggest problem in the gifts and t-shirts was to convert the logos that we had designed into a format that could be used by the printers. I would recommend clearing up this issue early in the process so there are no delays later in the process. Also, any t-shirt colors/designs should start with the Pantone Matching System - converting the colors in student t-shirt design to this PMS system was non-trivial.

## **16. Tours**

While four optional tours were planned, only two had any significant registration and so everything else was cancelled. The two trips were to Niagara Falls and to one Blue Jays baseball game. Both trips were very successful with positive feedback received from attendees. The Niagara Falls trip was especially popular with 140 registrants on 4 tour buses. The tour included the trip to and from Niagara Falls, a trip on the Maid-of-the-Mist, dinner and other attractions. It took a total of 9 hours (1-10pm on Wednesday, the afternoon without technical sessions), but everyone seemed quite happy on their return. About half of the 140 people registered in advance. The other half registered on site.

Organizing a trip to the Blue Jays game allowed ISIT attendees to sit together. We got a discounted rate from the Blue Jays.

Both trips were organized “at cost”.

## **17. Exhibitor Booths**

The booths were rented from Robinson Show Services in Toronto. This turned out to be a very simple process with the company being very thorough and professional in delivery, set up and removal. The booths were set up in the hotel foyer mixed in with the coffee breaks and such - the feedback from the exhibitors was very positive. They all seemed to appreciate the significantly higher than usual foot traffic.

We charged exhibitors C\$800 for two tables and C\$1000 for three tables. The exhibitors at ISIT 2008 included Springer, Cambridge University Press and NOW Publishers.

## **18. IT Soc Committee Activities**

ISIT local organizers arranged the following events on behalf of IT Soc:

- IT Society Board of Governors meeting (cost C\$3,129.04)
- Awards Luncheon Menu Printing (cost C\$1,730.61)
- Outreach Committee Panel Discussion “Balancing Your Career and Personal Life” with lunch (cost C\$1,343.64)
- Two Student Committee events: “Round Table Research Discussion” and “Panel Discussion”, both with lunches (total costs C\$7,600.37, including C\$1,506 for T-shirts.) The lunches were well attended.

We were asked to separate these costs from the ISIT budget.

## **19. Student Volunteers**

We asked about 30 local students to help with the A/V equipment in the session rooms, to put up and take down session programs displayed outside each room, and for collecting banquet and luncheon tickets. We produced T-shirts bearing ISIT logo for the students. We also gave each of them a gift card as a token of appreciation.

Student volunteers were solicited by e-mailing the list of student registrants a few weeks before the start of the conference, and all graduate students within the Communications group at the ECE Department of the University of Toronto. Ultimately, the volunteers were drawn mostly from U of T, but there were a number from elsewhere. The management of the volunteers needs to be carefully thought out, including drawing up a detailed task list with exact times at which tasks were to be started and completed, e.g. "Placing banquet menus on tables: start 6.00pm, end 6.30pm. Doors open: 7.00pm. A, B at door 1, C, D at door 2". This minimizes the risk that anything important is overlooked.

## **20. Currency Conversion**

The conference did a number of currency exchanges post-conference (in the September to November 2008 timeframe) with an average exchange rate of US \$1 = C\$1.154, or C\$1 = US\$0.8665.

## **21. Budget Surplus**

We prepared our initial budget with a requirement for producing 15% surplus. The total budget was about C\$524,000. The initial projected surplus was about C\$81,000.

The conference eventually produced a surplus of C\$132,094.90, not including the audit fee (which should be about C\$3,364). This is equivalent to about US\$110K surplus. The increased surplus is due to following factors:

On the revenue side:

- The actual registration number was about 5% higher than anticipated, bringing in an extra C\$10K revenue;
- Because of the delay in NSF funding, the conference did not spend all sponsorship funds on student travel grant, effectively contributing US\$10K to the surplus;
- The conference received Goods and Services Tax Rebate of about C\$4K in hotel food and beverages, and C\$3K in other services;
- Bank interest: about C\$3K

Total extra revenue: about C\$30K

On the expenses side:

- We budgeted C\$19 per registrant for the production of final program, the book of abstracts, and the CD-ROM. The actual costs were considerably lower (at about C\$8), saving us C\$10K.
- We were C\$5K under budget in food and beverage consumption despite the higher registrations mainly because quite a few people did not attend the banquet.
- We budgeted C\$5K of organizer meetings, but only used \$1.6K, saving \$3.4K.
- We used complementary hotel rooms to accommodate CMS staff travel, saving us C\$2.5K.
- There were a few items not in the initial budget, for example, the hotel charged us for receiving shipments, extra power drop that needs to be installed in the plenary room and in the Internet room. We gave gift cards to student volunteers.

Total expenses saving: about C\$15K.

This explains the extra C\$45K surplus.

## 22. Goods and Services Tax (GST) Refund

Foreign conventions (defined as a convention with a foreign sponsor, i.e. IEEE, and with at least 75% of the registrants being non-residents of Canada) do not need to charge GST on registration, and are entitled to receive 100% GST refund on convention supplies (e.g. A/V contract) and 50% GST refund on food and beverages.

Conference supplies are subject to provincial sales tax (PST).

IEEE has a worldwide tax compliance office to help us sort out the tax matters.

## 23. Audit

IEEE recommends conferences held outside of the U.S. to arrange for a local auditor. However, we did choose to use the IEEE audit department. The audit fee was 0.6% of the higher of the total revenue or expense, to a maximum of US\$6,000. The audit process required all original receipts, invoices, contracts, bank deposit/withdraw slips, bank statements, credit processing statements, and 10% samples of registration forms.

## 24. Final Distribution to IEEE

	<b>CAN</b>	<b>USD</b>
Conference Surplus	\$ 132,094.90	\$ 114,465.00
Loan Repayment	\$ 34,620.60	\$ 30,000.00
IT Soc Awards Printing	\$ 3,129.04	\$ 2,711.43
IT Soc BoG Meeting	\$ 1,730.61	\$ 1,499.63
IT Soc Outreach Committee	\$ 1,343.64	\$ 1,164.31
IT Soc Student Committee	\$ 7,600.37	\$ 6,586.00
<b>Amount Transferred to IEEE</b>	<b>\$ 152,911.83</b>	<b>\$ 132,503.63</b>

The audit fee (approx. C\$3,364) still needs to be subtracted from the above amount.