Things to think about ("Best Practices") when organizing IEEE IT Soc-sponsored schools

Version: 1.03, S. Draper 9/27/2018

- Organizing committee: Think about building a diverse organizing committee in terms of, e.g., seniority, gender, ethnic, geographic. Regarding a diversity of seniorities, note that the organization of a school can provide young faculty a good first opportunity to lead an organizing effort. It sometimes makes sense for senior faculty to play more of an advising and supporting role. Regarding geographic diversity, the organization of a school can present an opportunity for faculty from multiple local (or semi-local) institutions to collaborate.

- Keynote speakers: Schools should have at least one female speaker. Many schools have 5 speakers, so this is a minimal target of only 20%. For those that have other formats, e.g., mini-course + tutorials aim for this percentage in each averaged across time.

- Other speakers: Some schools have also had younger professors / research staff present in shorter formats than the keynote tutorials. Such structure can help create bridge in seniority between PhD students and the internationally recognized keynote speakers, also helping to foster future year organizers of the school.

- Poster session: Schools should have an opportunity for students to present. This should be made a (near) requirement of attendance – to present a result. Note that one need not present a new research result. One choice for new students who haven’t yet gotten going in research is to present a tutorial poster. A main objective of the schools is to help students improve their presentation and personal and professional networks. Presentation in a poster session can help met this objective.

- Location: Schools should aim for geographic diversity. E.g., most often organizers should avoid holding the school more than once at the same institution, in the same region, in the same country (the correct measure of geographic diversity varies with the particular school).

- Statistics and final report: School organizers should collect statistics on attendees to be presented to the IT Soc BoG (Board of Governors) and Schools Committee in their final report. Statistics to include:
  - (i) total number attendees,
  - (ii) estimate of total number of attendee-days,
  - (iii) breakdown of attendee counts into categories including students, faculty, young professionals, women/men,
  - (iv) breakdown of attendees by 1st time attendee, 2nd time, 3rd time or more,
  - (v) detailed cost breakdown of the school,
  - (vi) responses/results of the attendee survey for feedback on various aspects of the school activities and the lectures (including feedback for future lecturers).

- Timing of proposal:
  - Organizers should be in touch with the Chair of the Schools Committee ASAP. The Chair works with the IT Soc Treasurer to allocate funds to the various schools. The IT Soc budget for year N is determined around the time of the ISIT BoG meeting in year N-1. So, if a school is going to be proposed to be held in
year N, the Schools Committee Chair should be contacted well ahead of time, for example late in year N-2, or the latest early in year N-1. (The actual proposal can come later, more on that next, but the funding envelope must be created.)

- Organizers should note that any proposal must be considered first by the Schools Committee before going to the BoG. Formally, it is the Schools Committee that brings the motion for support to the BoG. Circulating the proposal amongst the Schools Committee, getting feedback from the Schools Committee, providing that feedback to the Organizing Committee for revision, and then getting the Schools Committee a (hopefully) final proposal in time for the Schools Committee to prepare materials for a presentation at a BoG meeting takes some time. Proposals should get to the BoG at least two BoG meetings (ideally three) prior to the school being held. As alluded to above, school organizers should note it is not a trivial process for ITSoC and the IEEE to make funds available, hence the significant lead time.

- In terms of timings, there are three BoG meetings per year, recently they have been held in Feb, in June/July (at ISIT), and in October.

- Based on previous experience, the Schools Committee prefers to bring forward a motion on (and discussion about) one school per BoG meeting. In recent years, we have converged to the European school proposed in the February (@ITA) BoG meeting, NASIT in the June/July (@ISIT) BoG meeting, and India in the October (@Chicago) BoG meeting. Schools requesting smaller allocations, new initiatives or those that are held less frequently than annual can be proposed in any BoG meeting.

- **Funding level:** The motion to the BoG of what level to support each school at is made by the Schools Committee (and not by the organizers). The Committee works with the ITSoC Treasurer and other officers to scope the budget for Schools. The organizers should work with the Schools Committee Chair to include a motion for the Committee to make that reflects the ITSoC budget.

- **Must set up the school as an IEEE conference:**
  - To receive support from ITSoC, every school must register as an IEEE Conference (navigate to https://www.ieee.org/conferences/organizers/conf-app.html to register a conference). Funds must be transferred from the IEEE prior to the conference, and unused funds must be returned to the IEEE.
  - Getting the funds from IEEE can be a bit tricky before of their usual processes. In particular, they treat the school as a conference by default.
  - It could be important to secure in kind contributions from home institutions in the form of staff time. E.g., processing reimbursement is extremely time consuming.

- **Cost to attendees:** Always remember to try and run the school with as little (or even no) cost to the student attendees and try to make this explicit in advertising for the school. The society support is provided to reduce/remove the cost to student attendees. Running the school on a university campus helps getting free classroom space and A/V equipment, as well as local staff and volunteer support.
• **Budget Tips:** For NASIT, additional Padovani funds maybe available; please check with the school committee chair ahead of the proposal preparation to verify the availability. Consider applying for additional support to entities that maybe able to provide it. For NASIT, NSF has provided travel grants as well as DoD. For European schools industry funding has been successfully obtained. For schools in Asia governmental support has been obtained as well. Finally, when running the school, do spend the money ahead of time. This means to keep the registration fee (inclusive of food and lodging) low or at least make a promise to the potential attendees that travel grants will reimburse the cost. It is often that additional federal/industry support arrives very close to or after the school takes place and organizers are conservative in spending. This may lead to some potential attendees shying away from applying to schools. It has been often recently that society funds have been partially returned, which due to timing, often is returned in a manner that is not usable for the Society in the current year. So, do spend the money by reimbursing the student attendees’ expenses.

• **Registration Fees:** See above for tips in reducing these fees. If a registration fee is charged, remember that the students who are IT Society members need to have a reduced fee where the reduction is sized sufficiently large to incentivize these attendees to sign up for the society membership. Along these lines, the IEEE sometimes likes to see differential registration fees depending on attendee membership (ITSoc / only IEEE / non-IEEE). Please consult with the Schools Chair.