

## ICSE Conference General Chair

**Principal Sponsor Contact:** ICSE Steering Committee Chair and ACM and IEEE designates

**Duration of Appointment:** 48 months (3 years before the conference and one year after the conference)

**Purpose:** To oversee the activities of all conference committee chairs; to ensure that the objectives of the conference as established by the Steering Committee or SIGSOFT and TCSE are met, and to serve as a focal point for communications between the conference committee, the sponsoring societies and their staff.

### A. Major Responsibilities

1. In consultation with ACM and IEEE staff liaisons, select conference city and hotel. Seek approval of conference site from ICSE Steering Committee. Let ACM and IEEE staff liaisons negotiate hotel contract (do not negotiate contract yourself).
2. Develop a master plan including timelines, milestones, deadlines and check lists for the entire conference for all chairs. Develop a theme for the specific ICSE conference.
3. Submit preliminary Approval Form (PAF) - This form allows conference organizers to secure dates on the ACM and IEEE Computer Society conference calendars and obtain agreement in principle from all sponsors (ACM, IEEE, and other co-sponsors) that the conference will occur. Note that this form does not grant rights to conference organizers to enter into contracts, to incur expenses, to advertise conference registration rates, to open a bank account, or to collect funds for the conference.
4. Work with Treasurer to prepare budget. Review and approve all items that exceed approved budgeted expenses. The General Chair is ultimately responsible for the revenue and expenses of the conference.

It is important to review and understand the requirements of both IEEE CS and ACM in terms of the budgeting process, especially administrative fees of IEEE CS and ACM's allocation requirement.

Technical Meeting Request Forms (TMRF) - The overall purpose of the TMRF is to collect the information that is necessary to evaluate the conference being proposed for approval. The TMRF should be looked at as a basic planning document to help you identify decisions which must be made in the planning process. Consistently using the IEEE TMRF will provide readily comparable information for future conference leaders. Note that administrative fees as well as contingency and profit margins are required. Use of the ACM TMRF is also acceptable.

5. Recruit and appoint committee chairs for the technical and administrative portions of the conference. (Note that Program Chair and Treasurer are required positions for ACM events.) Other leadership positions are appointed at the discretion of the Conference Chair but are strongly advised.

Here is a listing of potential positions:

- a. Program Co-Chairs (must be approved by ICSE Steering Committee)
  - b. Workshop Co-Chairs (must be approved by ICSE Steering Committee)
  - c. Tutorial Co-Chairs (must be approved by ICSE Steering Committee)
  - d. Chairs for several subcommittees dealing with different aspects of the program:
    - (1) Collocated Events,
    - (2) Industrial Track,
    - (3) Education Track,
    - (4) Research Demo Track,
    - (5) New Faculty Symposium,
    - (6) Frontiers of Software Practice
  - e. Web Master
  - f. Proceedings and CD Chair
  - g. Treasurer
  - h. Fund-raising and Sponsorship Chair
  - i. Promotions and Publicity Chair
  - j. Registration Chair
  - k. Local Arrangements Chair
  - l. Student Volunteers Chair
6. Inform the chairs of their duties and distribute materials describing the responsibilities for each. Be sure that each understands budgetary allocations, deadlines for tasks, and the basic conference policies and procedures of the co-sponsors.
7. Decide on financial (central versus distributed accounting, banking, contracts, registration, donations), administrative (e.g., liaison with ACM and IEEE, conference calls, program and conference committee meetings, publicity strategy, web site), and logistical management (e.g., conference week schedule, room assignments, signage, AV, catering, exhibits, final program) in consultation with ACM and IEEE staff liaisons.
8. Endorse all contractual agreements for the conference. With endorsement, administrating sponsor will review/negotiate and execute contracts making sure they comply with contract guidelines. Consult extensively with ACM and IEEE staff liaisons on all contracts.
- Work with the administrative co-sponsor in issuing RFPs for conference vendors, including Registration Management, Conference Management, Audiovisual, etc.; evaluating proposals and entering contracts with vendors for the conference.
9. Establish an evaluation mechanism for all aspects of the Conference.
10. Chair opening and closing sessions at the conference.
11. Conduct a postmortem session at the end of the conference (usually Saturday morning) for future conference organizers.
12. Prepare a final report for the conference and submit it to the Steering Committee Chair and ACM and IEEE staff liaisons no later than 120 days following the conference. The final report should include:
- a. A copy of the TMRF with actuals provided in the designated columns on the budget detail.
  - b. All registration details (fees and number of attendees for each category) figures which will help future years' conference organizers.

- c. List of conference participants
- d. Fund-raising strategy
- e. Publicity strategy
- f. Conference management strategy
- g. Summary of tools used to perform functions, i.e. software for accounting, registration, sample forms or systems, etc.
- h. Lessons learned and a critique of problem areas and list of things you would have done differently. This will greatly enhance the planning efforts of future conference organizers.

This information should be posted on the ICSE Conferences website, as a reference for future conference leaders.

13. Prepare agendas for committee meetings and distribute minutes of the meetings to all members of the Conference Committee, Steering Committee Chair as well as the sponsor's volunteer and ACM and IEEE staff liaisons.
14. Present progress (in person) report bi-annually to the ICSE Steering Committee at its regularly scheduled meetings.
15. Establish discretionary policies (i.e. those policies not outlined by sponsors) governing the conference activities. This would include working with the Treasurer and other committee members to determine registration policies including comp guidelines, expense reimbursement guidelines and payment approval guidelines.
16. Ensure that the appropriate Thank-you notes are sent to all committee members. The ACM SIGSOFT and IEEE TCSE will present to the General Chair and the Program Co-Chairs a Certificate of Recognition.
17. For conferences outside US/North America:
  - a. Identify other co-sponsoring organizations (e.g., local organization in host country)
  - b. Working with co-sponsors, identify possible locations
  - c. Ensure that a Joint Sponsorship Agreement or Memorandum of Understanding is developed and signed that covers percentages of conference sponsorship and other financial, legal, copyright, etc., issues for conference
18. In consultation with Program Co-Chairs, invite keynote speakers.
19. It is highly recommended that the General Chair attend the postmortem sessions of prior ICSE events as a learning experience, from the point of being chosen General Chair.

It is also suggested that other orientation opportunities be provided, such as "shadowing" a prior General Chair or being copied in substantive discussions.

## **B. Chain of Accountability**

1. Oversee the technical, financial, administrative and logistical management of all activities related to the conference and uphold all policies and procedures of the co-sponsors.

2. Once the PAF is approved, establish a web site for the conference and send the URL to ACM and IEEE staff liaisons. Organizers can begin to publicize the conference call for papers deadline through electronic channels, SIGSOFT, TCSE, or any other avenue —provided the publicity incurs no expense.
3. The General Chair is responsible that ACM SIGSOFT, IEEE TCSE, and potentially other co-sponsors are featured—equally—on all conference and particularly publicity materials (e.g., wherever ICSE is mentioned) including conference calendars at the societies, conference web site, letter head, printed materials, call for papers, call for participation, registration forms, fliers, proceedings, CDs, conference bags, signage).
4. The General Chair is ultimately responsible for the revenue and expenses of the conference and thus responsible for delivering on administrative fees as well as contingency and profit margins. Note that the TMRF is a living document and keep the spreadsheet up-to-date throughout the conference planning to stay on top of the budget.
5. Develop a master plan including timelines, milestones, deadlines and check lists for the entire conference for all chairs. The General Chair is responsible that the conference planning stays on track and does not fall behind schedule.
6. Periodically review the activities of the conference committee members. Add: Replace if need be.

### **C. Resource Materials (see [www.icse-conferences.org](http://www.icse-conferences.org))**

1. Consult the Memorandum of Understanding (MOU) between the Association of Computing Machinery and the IEEE Computer Society regarding the International Conference on Software Engineering.
2. Review the “Guidelines for Organizing the International Conference on Software Engineering” dated May 14, 1992, which is the governing document for ICSE organization.
3. Review materials of previous ICSE conferences (e.g., final reports, TMRFs, web sites, post-mortem presentations, lessons learned). Many of these documents can be found at the official ICSE archival web site <http://www.icse-conferences.org/>, including feedback from General Chairs of previous ICSE conferences. Current ACM and IEEE staff liaisons for ICSE may also be sources for useful information..

### **Qualifications**

Support of employer since chairing a conference can take a considerable amount of time.

Additional support should also be available for modest clerical needs, email and telephone expenses, occasional correspondence, etc. The sponsors rely on this "in-kind" support in order to keep conference fees in line with sister society fees.

The General Chair is advised against committing to other volunteer activities since the success of the conference depends on the ongoing and regular management of the conference committee by the conference chair.

Must be an ACM or IEEE member.