

TECHNOLOGY FIST
CONFERENCE ORGANIZER'S HANDBOOK

Organizing a Conference

A practical handbook for preparing, initiating, and launching a scholarly conference

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A practical companion to the Rules and Policies rule book. Grounded in the requirements that indexers such as IEEE, Springer, and Scopus apply to conferences and their proceedings.

Contents

Right-click the list and choose "Update Field" to fill in page numbers.

How to use this handbook

This handbook walks an organizing body through a conference from first idea to published, indexed proceedings. It is a practical guide, not a policy: where the rule book says what the standards are, this handbook shows how to meet them in the order the work actually happens.

The material is arranged in twelve phases. Most run in sequence, though several overlap — you will be building the website while the call for papers is out, and lining up finance while the committee forms. Each phase opens with its purpose, sets out the steps, and ends with a short checklist you can lift straight into your own plan.

Throughout, the guidance reflects what selective indexers look for. IEEE, Springer, and the Scopus content board all reward the same things: a genuine event with a real committee, at least two qualified reviews per paper, a plagiarism check on every submission, honest fees, papers that were actually presented, and proceedings delivered with clean metadata and a signed account of how review was done. Build for those from the start and indexing follows; bolt them on at the end and it rarely does.

What a credible conference always has

Before the first task, it helps to know what a credible conference always has. Indexers phrase it differently, but the substance is the same everywhere. A conference that can show these eight things is on solid ground; one that cannot will struggle to be taken — or indexed — seriously.

A real event and a real committee. An identifiable organizing body, a named committee of consenting experts, and an announced programme — not a collection of papers assembled for a fee.

A defined, honest scope. A clear subject area, stated plainly in the call, and applied consistently when papers are judged.

Recognized backing. Sponsorship or technical co-sponsorship from a society, university, or established body that lends its name and its standards.

Genuine peer review. At least two qualified, independent reviews per paper, against written criteria, with records kept — the single point indexers probe hardest.

A similarity check on every paper. Automated screening (IEEE uses CrossCheck; iThenticate and Turnitin are equivalents) read in full, not just as a percentage.

Transparent fees. Charges disclosed before submission, never tied to acceptance, carried by an identifiable liable party.

Papers that were presented. Only work actually delivered at the event goes into the proceedings — IEEE will not post an unrepresented paper to Xplore, and neither should you.

Clean, citable output. Proceedings delivered with accurate metadata, a registered DOI per paper, an ISBN or ISSN, and a signed peer-review declaration.

The lifecycle at a glance

The twelve phases and the time each typically needs before the event. Most events compress this; the review window is the one span not to squeeze.

PHASE	WHAT HAPPENS	TYPICAL LEAD TIME BEFORE THE EVENT
1 · Concept & feasibility	Idea, scope, format, and a go/no-go decision	12–18 months
2 · Sponsorship & approval	Secure backing, financial liability, approval to publish	12–15 months
3 · Committee	Appoint leadership and recruit the programme committee	10–12 months
4 · Scientific planning	Tracks, keynotes, and the key-date calendar	9–12 months
5 · Identity & systems	Name, website, and the submission system	9–11 months
6 · Call for papers	Write, publish, and circulate the call	8–10 months
7 · Peer review	Assign reviewers, screen, decide, and record	3–6 months
8 · Registration & finance	Fees, payment, and budget management	4–8 months
9 · Programme & camera-ready	Schedule sessions; collect final papers	1–3 months
10 · The event	Run the meeting; confirm presentations	The event
11 · Proceedings	Deliver proceedings for publication and indexing	0–2 months after
12 · After	Report, retain records, and sustain the series	1–3 months after

The twelve phases

Phase 1 — Concept and feasibility

Purpose. *Decide whether the conference should exist, and in what shape, before committing money or names to it.*

Every conference starts with a reason to meet: a field that has grown enough to need a forum, a community without one nearby, a theme whose time has come. Name that reason first. If you cannot say in a sentence why this event needs to exist and who will come, the idea is not ready.

Settle the essentials while they are still cheap to change. Fix the scope — broad enough to fill a programme, narrow enough to have an identity. Choose the format: in person, fully virtual, or hybrid, each with different costs and reach. Estimate the scale in submissions and attendees, because almost every later decision follows from it. Sketch a first budget, even a rough one, so you know whether the numbers can work.

Close the phase with an honest go/no-go. A conference launched on optimism alone tends to surface its problems late, when they are expensive. One that has faced its feasibility early starts from firmer ground.

CHECKLIST

- ☐ The reason for the event and its audience are stated in a sentence.
- ☐ Scope, format (in person / virtual / hybrid), and rough scale are decided.
- ☐ A first-cut budget shows the event can at least break even.
- ☐ A go/no-go decision is recorded by the initiating group.

Phase 2 — Sponsorship, governance, and approval to publish

Purpose. *Give the event a body that stands behind it, a party that carries its finances, and a route to published, indexed proceedings.*

A conference needs an owner. Secure an organizing body — a society, a university department, a research institute — that will lend its name, its standards, and its accountability. Recognized backing is not a formality: technical co-sponsorship from an established body is one of the clearest signals of credibility, and indexers weigh it. Where more than one institution is involved, agree who leads and who is responsible for what, in writing.

Decide, early and explicitly, who carries the money. One identifiable, financially liable party — usually the host institution — should stand behind the budget, rather than an individual acting informally. This matters when a venue asks for a deposit and again if the event has to be cancelled.

Apply to publish before review opens, not after acceptances have gone out. Approach your publisher, confirm the event meets the eligibility conditions in the rule book, and

settle the publishing and financial terms up front. Leaving publication until the end is the most common way a good event ends up with proceedings no one will index.

CHECKLIST

- ☐ An organizing body with lawful standing owns the event.
- ☐ Sponsorship or technical co-sponsorship is confirmed in writing.
- ☐ One financially liable party is named and has accepted liability.
- ☐ Approval to publish is secured, and terms are agreed, before review opens.

Phase 3 — The organizing committee

Purpose. *Build a committee that separates running the event from judging the science, so no one both solicits and approves the papers.*

The committee is where credibility is won or lost. Appoint the leadership first — a General Chair who owns the event and a Technical Programme Chair who owns the review — and keep those responsibilities in different hands. Around them, build a Technical Programme Committee of qualified reviewers deep enough to cover your scope and large enough to carry the review load without exhausting anyone.

Recruit real people and get their consent. A committee padded with names that never agreed to serve is a transparency breach that indexers and readers do spot, and it can sink an otherwise sound event. Aim for range as well as depth: a committee drawn from several institutions and countries reviews better and reads as more independent than one from a single lab.

Set the ground rules as you recruit. Reviewers judge the work, not the author; anyone with a competing interest in a paper steps back from it; and no one decides on a submission they co-authored. Writing these down now saves an awkward conversation later.

CHECKLIST

- ☐ A General Chair and a Technical Programme Chair are appointed, with review independent of event management.
- ☐ A programme committee of consenting, qualified reviewers covers the scope.
- ☐ Committee members span more than one institution and region.
- ☐ Conflict-of-interest and independence rules are agreed and recorded.

Phase 4 — Scientific planning

Purpose. *Shape the programme and set the calendar the whole community will plan around.*

Turn the scope into a structure. Break the field into tracks or themes that authors will recognize, and line up the invited content — keynotes and tutorials — that gives the programme its spine and draws an audience. Approach prospective keynote speakers early; the good ones are booked far ahead.

Then build the calendar, working backwards from the event date. The key dates — call issued, submission deadline, review complete, notification, camera-ready — are the framework everything else hangs on, and once published they are a commitment. Leave review enough room: a fortnight is not long enough to review well, and a schedule that starves review of time is the surest route to a weak programme.

CHECKLIST

- ☐ Tracks or themes are defined and cover the scope.
- ☐ Keynote and invited speakers are identified and being approached.
- ☐ A full key-date calendar is set by working back from the event date.
- ☐ The review window is realistic (several weeks, not days).

Phase 5 — Identity and systems

Purpose. *Give the conference a name people can find and the infrastructure to run submission and review.*

Choose a name and acronym that are distinct and easy to search, and check that neither collides with an existing event — a surprising number of credibility problems begin with a name confusingly close to something else. Put up a website that states the scope, committee, key dates, and call plainly, and keep every claim on it accurate: an indexing status you have not secured, or a metric you cannot support, does more harm than the gap it papers over.

Stand up the submission and review system early enough to test it before authors arrive. It needs to take submissions, manage assignments to reviewers, collect reviews against your criteria, and keep the records you will need later. Whatever platform you use, confirm it can produce the review trail — who reviewed what, and on what basis — because you will be asked to account for it.

CHECKLIST

- ☐ A distinct, searchable name and acronym are chosen and checked for clashes.
- ☐ The website states scope, committee, dates, and call, with no inaccurate claims.
- ☐ A submission/review system is live and tested before the call opens.
- ☐ The system can retain the full assignment, review, and decision record.

Phase 6 — The call for papers

Purpose. *Invite the right work, on clear terms, without any of the signals that mark an event as predatory.*

The call for papers is the event's public face and its first test of honesty. State the scope, the tracks, the submission format and length, the key dates, and the review process. Say plainly how papers will be judged and that acceptance is never guaranteed or tied to a fee. Disclose the charges, and what they cover, so no author is surprised later.

Circulate it where the community actually is — mailing lists, societies, partner institutions, and the usual academic channels — rather than through mass unsolicited

email, which is itself a predatory marker. A call that promises guaranteed acceptance, hides its fees, oversells indexing, or arrives as spam does lasting damage to an event's standing, whatever the science behind it.

CHECKLIST

- ☐ The call states scope, format, key dates, and the review process.
- ☐ Fees and what they cover are disclosed; acceptance is not tied to payment.
- ☐ No guaranteed-acceptance or inflated indexing claims appear anywhere.
- ☐ Distribution is through legitimate community channels, not bulk spam.

Phase 7 — Peer review

Purpose. *Run the review that lets a reader trust the papers without repeating them — the part indexers examine most closely.*

This is the phase that decides whether the proceedings will be respected. Follow the standard the recognized publishers hold to: every paper reviewed by at least two qualified, independent reviewers, none of them an author of that paper, judging against written criteria and returning a clear recommendation with comments the author can use. Accept a paper only where the reviewers actually support it; a paper no reviewer backs does not go in, whatever it does to the acceptance rate.

Screen every submission for similarity before you accept it. IEEE routes submissions through CrossCheck; iThenticate and Turnitin do the same job. Read the report, not just the headline number — one heavily copied section matters more than a scatter of common phrases. Handle any real case as misconduct, under the rule book.

Keep the records as you go, because you will have to account for them. Retain the assignments, the reviews, and the basis of each decision, and have the Programme or Publication Chair prepare the peer-review declaration — the signed statement of how review was actually conducted that goes to the publisher with the proceedings. That declaration is a statement of fact; certifying a process that did not happen ends the publishing arrangement and, rightly, the event's credibility.

CHECKLIST

- ☐ Every paper has at least two independent, qualified reviews.
- ☐ Decisions rest on reviewer support and written criteria, taken by someone with no conflict.
- ☐ Every submission is similarity-checked and the report is read in full.
- ☐ Assignment, review, and decision records are retained.
- ☐ A signed peer-review declaration is prepared for the publisher.

Phase 8 — Registration, fees, and finance

Purpose. *Fund the event on transparent terms and manage the budget through to a clean close.*

Set a fee structure that covers the event without gouging attendees, with the categories a real audience needs — member and non-member, student, early-bird, virtual, and a

workable position for authors of accepted papers. Keep the publication charge, where there is one, distinct and transparent, and never let acceptance depend on it. The line between judging a paper and charging for it is one indexers watch, and blurring it is a fast route to a bad reputation.

Run the money properly. Take payment through a system that issues receipts and keeps records, track income against the budget as registrations arrive, and hold a contingency for the costs that always appear. Decide your refund position — for cancellation by an attendee and, more importantly, by the organizers — before you need it, and state it where registrants can see it.

CHECKLIST

- ☐ Fee categories fit the audience; early-bird and student rates are set.
- ☐ Any publication charge is separate, disclosed, and not tied to acceptance.
- ☐ Payment runs through a system that issues receipts and keeps records.
- ☐ A refund and cancellation policy is decided and published in advance.

Phase 9 — Programme assembly and camera-ready

Purpose. *Turn accepted papers into a schedule, and collect the final files the proceedings are built from.*

Assemble the accepted papers into sessions that group naturally, and give each session a chair to keep it to time and lead the discussion. Publish the programme far enough ahead that authors and attendees can plan travel and registration around it.

Collect camera-ready papers against your template and against the fixes reviewers asked for — a camera-ready is the corrected paper, not simply the accepted one. Where your publisher provides a format-validation tool (IEEE's PDF eXpress is the familiar example), require every author to pass their file through it, and gather the copyright or licence form and any third-party permissions at the same time. The metadata attached to each paper — title, authors, affiliations, abstract, keywords — becomes the citation and the index entry, so it has to be right here, not fixed later.

CHECKLIST

- ☐ Accepted papers are scheduled into sessions, each with a chair.
- ☐ The programme is published early enough for planning.
- ☐ Camera-ready files follow the template and include reviewers' fixes.
- ☐ Format validation is passed and copyright/licence forms are collected.
- ☐ Per-paper metadata is complete and accurate.

Phase 10 — Running the event

Purpose. *Deliver the meeting well, and confirm what was actually presented.*

On the day, the work of the earlier phases pays off, and the job becomes logistics and hospitality: registration that runs smoothly, sessions that start on time, and speakers

and chairs who know their roles. For a virtual or hybrid event, test the platform in advance and have someone whose only job is the technology, because that is where these events fail.

Keep one record that matters beyond the day: which papers were actually presented. The recognized publishers will not put an unrepresented paper into the indexed proceedings — IEEE marks it "not presented" or drops it — so track attendance at the session level and note any no-shows. A contingency for the predictable problems, a cancelled speaker or a failed connection, keeps a hitch from becoming a story.

CHECKLIST

- ☐ Registration, sessions, and session chairs are organized for the day.
- ☐ For virtual/hybrid, the platform is tested and has dedicated technical support.
- ☐ Presentation of each paper is recorded; no-shows are noted.
- ☐ A contingency plan covers cancelled speakers and technical failure.

Phase 11 — Proceedings and publication

Purpose. *Deliver clean, complete, citable proceedings that will be accepted and indexed.*

Assemble the proceedings from the presented papers only, each with its validated file and complete metadata. Send the publisher the full set together with the signatures that stand behind it: the organizer undertaking, the signed peer-review declaration, the financial-liability undertaking, and the author agreements and licences. Missing or inconsistent signatories are one of the commonest reasons publication stalls.

Let the publisher register a DOI for every paper and deposit the metadata, and confirm the proceedings carry an ISBN or the series ISSN. Indexing is the consequence of everything already done well — a genuine event, real review, honest fees, clean output — not a separate step to be bought. Claim only the indexing you have actually secured, and let the quality of the record make the case.

CHECKLIST

- ☐ Proceedings contain only presented papers, with validated files and full metadata.
- ☐ All required signatories and declarations are delivered to the publisher.
- ☐ A DOI is registered per paper; ISBN or series ISSN is confirmed.
- ☐ Indexing claims are accurate; nothing unearned is advertised.

Phase 12 — After the conference

Purpose. *Close the event cleanly and put the next edition on firmer ground.*

Finish what the event started. Reconcile the budget and settle accounts, gather feedback from attendees and reviewers while it is fresh, and write a short report that captures what worked and what did not — the single most useful document the next organizing team will have. Retain the review and decision records for the period the rule book requires; you may need them if a question about a paper surfaces later.

If the conference is to become a series, treat this close as the next event's Phase 1. A series earns its standing edition by edition, and a steady, well-run history is exactly what indexers reward when they assess it. Nothing sets up a strong second event like an honest account of the first.

CHECKLIST

- ☐ The budget is reconciled and accounts are settled.
- ☐ Attendee and reviewer feedback is collected and a post-event report is written.
- ☐ Review and decision records are retained per the rule book.
- ☐ Lessons and materials are handed to the next organizing team.

Appendices

Appendix A — Master countdown

A month-by-month view of the phases, working back from the event. Compress it for a smaller event, but do not compress the review window — that is where quality is made or lost.

WHEN	FOCUS
12–18 months out	Concept and feasibility; go/no-go (Phase 1).
12–15 months out	Sponsorship, liable party, approval to publish (Phase 2).
10–12 months out	Appoint leadership; recruit the committee (Phase 3).
9–12 months out	Tracks, keynotes, key-date calendar (Phase 4).
9–11 months out	Name, website, submission system live (Phase 5).
8–10 months out	Publish and circulate the call for papers (Phase 6).
5–6 months out	Submission deadline; assign reviewers (Phases 6–7).
3–5 months out	Peer review and similarity screening; decisions (Phase 7).
3–4 months out	Notifications; open registration (Phases 7–8).
1–3 months out	Camera-ready collection; programme assembly (Phase 9).
Event	Run the meeting; record presentations (Phase 10).
0–2 months after	Deliver proceedings; DOI and indexing (Phase 11).
1–3 months after	Reconcile, report, retain records (Phase 12).

Appendix B — Launch checklist

The phase checklists gathered into one list you can work down. Every box should be ticked before the item it belongs to goes live.

- ☐ Reason for the event and audience stated in a sentence.
- ☐ Scope, format, and scale decided; first budget drafted.
- ☐ Go/no-go recorded.
- ☐ Organizing body and sponsorship confirmed in writing.
- ☐ Financially liable party named and committed.
- ☐ Approval to publish secured before review opens.
- ☐ General Chair and Programme Chair appointed (review kept independent).
- ☐ Programme committee of consenting, qualified, diverse reviewers in place.
- ☐ Conflict-of-interest rules agreed.
- ☐ Tracks, keynotes, and a full key-date calendar set.

- ☐ Name and acronym chosen and checked; website live and accurate.
- ☐ Submission and review system tested; record-keeping confirmed.
- ☐ Call for papers published with fees disclosed and no false claims.
- ☐ Two-plus independent reviews per paper; decisions on reviewer support.
- ☐ Every submission similarity-checked; report read in full.
- ☐ Review and decision records retained; peer-review declaration prepared.
- ☐ Fee categories set; publication charge separate and not tied to acceptance.
- ☐ Payment system issues receipts; refund policy published.
- ☐ Programme assembled; camera-ready files validated and complete.
- ☐ Presentations recorded at the event; no-shows noted.
- ☐ Proceedings (presented papers only) delivered with all signatories.
- ☐ DOI per paper and ISBN/ISSN confirmed; indexing claims accurate.
- ☐ Budget reconciled; report written; records retained; handover done.

Appendix C — Budget template

A starting line-item budget. Fill in the figures for your event, keep income realistic, and hold a contingency of around ten percent — some cost always appears late.

Income

INCOME LINE	NOTES
Registration — regular	Member / non-member categories
Registration — student	Reduced rate
Registration — virtual	Where hybrid or online
Publication charges	Separate from registration; disclosed to authors
Sponsorship / grants	Cash and in-kind
Exhibition / booths	Where applicable

Expenditure

EXPENSE LINE	NOTES
Venue and facilities	Rooms, AV, network
Catering	Per-head; refreshments and meals
Publishing and DOI	Proceedings production and registration
Similarity checking	CrossCheck / iThenticate / Turnitin
Website and submission system	Platform and hosting
Keynote costs	Travel, accommodation, honoraria

EXPENSE LINE	NOTES
Printing and materials	Badges, signage, programme
Staff and volunteers	On-site support
Contingency (~10%)	For the unforeseen

Appendix D — Committee roster template

Record every committee member with their consent, so the roster is real and accountable. Keep it current — an out-of-date board is a transparency problem.

ROLE	NAME / AFFILIATION	CONSENT RECORDED
General / Conference Chair		
Technical Programme Chair		
Publication / Proceedings Chair		
Track Chair — [track]		
Programme Committee member		
Programme Committee member		
Advisory / Steering member		

Appendix E — Documents and signatories

What the publisher needs before the proceedings can be published, drawn from the rule book. Assemble these as you go, not in the final week.

DOCUMENT	SIGNED BY	WHEN
Approval-to-publish application	Organizing body	Before review opens
Organizer undertaking	General / Conference Chair	Before publication
Peer-review declaration	Programme / Publication Chair	With the proceedings
Financial-liability undertaking	Officer of the liable institution	Before production
Author agreement and licence	Corresponding author (each paper)	At camera-ready
Third-party permissions	Corresponding author, as needed	At camera-ready

Appendix F — Credibility check: what gets a conference rejected

The markers that make indexers and serious authors walk away. If any of these describe your event, fix it before you launch — every one is avoidable, and every one is fatal to indexing.

- ✗ Guaranteed acceptance, or acceptance that depends on paying a fee.
- ✗ A committee or board listing people who never agreed to serve.
- ✗ Fees that are hidden, or only revealed after acceptance.
- ✗ Peer review that is claimed but not actually done, or done by one reviewer.
- ✗ No similarity checking, or ignoring what the check reports.
- ✗ Indexing or metrics claimed but not held.
- ✗ Recruiting authors through mass unsolicited spam.
- ✗ Publishing papers that were never presented at the event.
- ✗ A scope so broad or vague that any paper "fits".
- ✗ A name chosen to be confused with an established conference.

End of handbook · Version 1.0 · TECHNOLOGY FIST