

**ENGINEERING CONFERENCES INTERNATIONAL**

***MANUAL***

**FOR CONFERENCE CHAIRS**

*For Assistance and Information  
in Planning and Conducting an  
ECI Conference*

**Engineering Conferences International  
32 Broadway, Suite 314  
New York, NY 10004  
1-212-514-6760  
Fax: 1-212-514-6030  
[www.engconfintl.org](http://www.engconfintl.org)**

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# Engineering Conferences International

32 Broadway, Suite 314

New York, NY 10004

Phone: 1-212-514-6760 - Fax: 1-212-514-6030

Email: [info@engconfintl.org](mailto:info@engconfintl.org)

Dear Conference Chair:

We are pleased to be working with you on your upcoming conference.

This Manual - always a Work in Progress - is intended to be a guide for you during the planning stages of your conference.

We ask that you keep to suggested timelines and deadlines. As ECI sponsors approximately 20-25 conferences each year, it is very important to keep on schedule so that each conference can be given the staff attention it deserves.

We also ask that you (or one person designated by you) be the point of contact with the office. This keeps communication clear.

Please appoint your conference liaison as an *ex officio* member of your organizing committee. He or she can provide valuable advice throughout the planning process.

Remember, the quality of an ECI conference depends on the chair(s). The chair is responsible for the technical program, for ensuring that invited speakers make the desired type of presentation, and for seeing that discussion periods are properly organized and conducted.

If at any time you believe the attendance at your conference will not meet expectations it is important that you contact ECI immediately. ECI makes substantial financial commitments to conference hotels and the sooner we know of any problems, the sooner we can contact a hotel to negotiate a reduction of our commitment.

Anytime you have questions or need assistance, please call us at 1-212-514-6760. We are here to work with you to make your conference a successful one.

Best wishes,

Barbara K. Hickernell, CAE  
Executive Director

# HISTORY OF THE CONFERENCES PROGRAM

*The following is a brief summary from The First 75 Years: A History of the Engineering Foundation by Lance E. Metz and Ivan M. Viest.*

In 1914, Cleveland manufacturer Ambrose Swasey offered to provide funds for support of engineering research. In response, the United Engineering Society (UES), a public corporation composed of representatives of the societies of electrical, mechanical and mining engineers, established the Engineering Foundation as a department of UES. This new organization was given the power to receive and administer funds from any source for the purpose of supporting "the furtherance of research in science and engineering, or advancement in any other manner of the profession of engineering and the good of mankind."

The Foundation soon began receiving requests for funding various research projects. The first grant was awarded in 1916 to conduct research on the strength and wearing power of gears. Over the years the Foundation has provided financial support to over 400 projects, most of which can be classified as engineering research or engineering-related research.

The first major contribution of the Engineering Foundation to the development of American engineering was the role it played in the establishment of the National Research Council. Created in 1916 by the National Academy of Sciences, at the request of President Wilson, for the purpose of engendering cooperation of governmental, educational, industrial and other research agencies in the dual interest of national defense and of scientific and industrial research, the new Council had no funds to begin its operations. The Engineering Foundation filled the need by financing the NRC during the first year of its existence.

The bulk of the Foundation's activities through 1930 can be characterized as sponsorship of engineering research projects.

The Engineering Foundation began its involvement in efforts to improve engineering education through its support of the Engineers Council for Professional Development, known today as the Accreditation Board for Engineering and Technology (ABET). To help alleviate the impact of the Depression on individual engineers, the Engineering Foundation sponsored courses for unemployed engineers.

Between 1946 and 1960 several additional research councils were formed. These independent bodies were formed on the basis of nationwide representation from academic, industrial, and governmental organizations that were interested in the same broad field of engineering. Another major Engineering Foundation contribution was its efforts in the early 1960s to establish the National Academy of Engineering. Through its broad perspective, organizational know-how, and the use of its funds, the Foundation served as a catalyst in the creation of this important institution.

The Engineering Foundation's primary focus from 1962 through 2001 was its conferences program. Engineering Foundation conferences were initiated to promote discussions of new knowledge in engineering and science fields and to develop an interface with other disciplines. The conference format promotes discussion and enhances rapport among participants. These conferences have been instrumental in generating ideas and disseminating information in greater depth than is possible through most conventional presentations or publications. During that period over 850 such conferences were held on topics ranging from Corrosion Engineering to Professional Liability to Engineering in Medicine.

On January 1, 2002 the United Engineering Foundation, as it was then called, transferred its conferences program. The program became known as Engineering Conferences International (ECI) and it is the successor program to the United Engineering Foundation conferences program. It was briefly affiliated with Polytechnic University.

The ECI program continues to provide an opportunity for the exploration of problems and issues of concern to engineers from many disciplines. ECI, incorporated in the state of New York, is a not-for-profit 501(c)3 organization with its own Board of Directors and Conferences Committee whose volunteers, international in scope and interdisciplinary in outlook, continue to serve the engineering and scientific community.

The ECI staff, with its many years of expertise in conference management, has the responsibility for the financial and administrative operation of the conferences program. The ECI conferences program is expected to be self-supporting on a yearly basis.

The conferences sponsored can be classified into four broad categories:

1. **New Interdisciplinary Conferences** - Conferences organized on a specific topic of current interest that involves a broad spectrum of the scientific and engineering community. Professional societies may have offered a session in one aspect of the topic at one of their traditional technical meetings. The success of these conferences depends on the ability of the Chair and Co-Chair to draw conference participants from a wide range of disciplines to discuss the topic in detail.
2. **Continuing Interdisciplinary Conferences** - Many of the successful new conferences give rise to one or more successor conferences on the same topic that are held on a one to three year schedule.
3. **Technical Conferences** - Conferences that deal with a specific topic that involves a single general research area and which may be co-sponsored by one or more professional societies.
4. **Support Conferences** - Conferences for which the ECI serves as an umbrella support organization for one or more technical groups.

The Conferences Committee is responsible for the planning, management, operation and evaluation of the conferences. Members and Affiliates of the committee all volunteer their services.

The Executive Director and staff provide administrative direction to the conference both from the New York office and at the various conference venues. They are constantly engaged with the conference chairs, organizing committees, personnel at conference sites, and participants in their endeavor to make the conferences vital, rewarding, and enjoyable.

The ECI program has a rich history of conferences and the volunteers involved in the program endeavor to focus the attention of the engineering and scientific community on emerging areas of concern.

**ENGINEERING CONFERENCES INTERNATIONAL  
BOARD OF DIRECTORS  
AND  
CONFERENCES COMMITTEE**

**Board of Directors**

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Joye Bramble  
Peter Gray  
Michael King  
Raymond J. McCabe  
William Sachs  
Eugene Schaefer  
P. "Som" Somasundaran

Herman Bieber, Director Emeritus  
Allen Laskin, Director Emeritus  
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**Consulting Members**

Christina Chan, Matt Lazzara

Barbara K. Hickernell, *ex officio*

## THE CONFERENCE PROPOSAL

A conference must meet the following criteria:

1. Its subject must be important to one or more branches of engineering or interface with engineering and be of national or international importance. Ideally, it will be interdisciplinary in nature, both with respect to the topics discussed and the background of the attendees. The conference theme must not be too narrow or too specialized, or too general and diffuse as this will hinder attracting participants and limit discussion. A conference largely reflecting the chair's own areas of interest will be relatively easy to organize but many others in the field may find it too narrowly focused.
2. Its subject must be timely.
3. It must not conflict significantly with other organized conferences in timing, content, direction or purpose.
4. Its purpose must be accommodated more effectively by a four and one-half day (or three and one-half day) conference than by the usual technical sessions of an engineering society's major meetings or by shorter specialty conferences or workshops.
5. It must be deemed sufficiently attractive to draw attendance of 70 or more persons, but be limited to 350 or fewer participants to assure both a good mix of participants and effective dialogue. Most ECI conferences have 70-100 attendees.
6. It should be held for purposes of intellectual debate and exchange of ideas and should not be tutorial, in the sense of academic instruction, except that a background or state-of-the art session may be useful to start conferees off on a common ground.  
  
*About 1/3 of the presentation time should be reserved for discussion. The hallmark of ECI conferences is their interdisciplinary nature and the extensive opportunities for discussion and networking that they provide.*
7. It must be reasonably free of proprietary and commercial aspects.

If the topic is thought to meet the criteria outlined above, the first formal step is to prepare a Conference Proposal. **Appendix A contains Conference Proposal Guidelines for proposers of both new and continuing conferences.**

In preparing the proposal, a preliminary communication with the Director is encouraged so that an appropriate Technical Liaison from the Conferences Committee can be assigned and that recommended conference sites and dates can be discussed.

A draft of the conference proposal should be sent to the Technical Liaison who will make recommendations before the final proposal is formally submitted.

It is essential that all the items on the form be fully and carefully executed and that a clear synopsis of the intended scope and content, about one page in length, be part of the proposal so that the Conferences Committee has all essential information required for its consideration.

We recommend a short statement answering the question "*Who should attend this Conference?*" as many potential participants from industry see the "call for papers" and may feel that the conference is geared to academics.

The proposer should submit a tentative program outline, understood to be subject to later detailing, but which reveals the essential structure of the conference and anticipated content of individual sessions including potential speakers. Also, the proposer should give evidence that at least some of the backup organization is tentatively committed -- co-leaders, organizing committee, and sessions leaders, names where possible. As ECI recognizes the importance of international communication and cooperation, the Conferences Committee recommends, wherever possible and appropriate, an international organizing committee.

In addition, ECI highly recommends that the appropriate technical societies be approached for possible co-sponsorship. In many cases, the liaison from the Conferences Committee and/or the Director will be helpful in this area.

A preliminary budget must be part of the proposal. This is particularly important if outside sources are going to be approached for financial support.

Support from ECI is generally limited to a Conference Chair's Fund of \$5,000 (minimum). This fund is populated by an additional line item in the conference fees, typically \$100 per non-student attendee (refer to the Chair's Fund information on page 16). Since most academic attendees require some sort of financial support, most conferences raise additional funds from industry and/or government agencies.

Once the Technical Liaison has reviewed the proposal and made suggestions, the proposal is then submitted to the ECI. The Technical Liaison will also submit a letter of recommendation.

The proposal is reviewed by members of the Conferences Committee and then sent to the Conferences Committee Chair and Vice Chair who review the comments and suggestions of the members. Any questions or concerns are discussed with the proposer. Once approval has been given, written notification is sent to the proposer by the Director.

**Appendix A contains both the Conference Proposal Guidelines for new conferences and for continuing conferences, and sample proposals.**

## ROLE OF THE TECHNICAL LIAISON

### The Technical Liaison

The Technical Liaison is generally a member or affiliate member of the Conferences Committee.

### Before the Proposal is Submitted to the Conferences Committee

The Technical Liaison discusses the potential conference with the proposer, receives the draft proposal, makes comments and suggestions and then sends the final version of the proposal to the ECI Executive Director along with his/her comments and recommendations.

### Before the Conference

The Technical Liaison should be appointed as an *ex officio* member of the Conference Organizing Committee. He or she and the chair keep in close touch regarding the progress of the program, speakers, finances, etc.

The Technical Liaison will periodically check the number and quality of abstracts submitted for the conference and will contact the conference chair if it is felt that more abstracts should be solicited to ensure a full program.

The Technical Liaison will also periodically contact the conference chair to monitor the progress of the progress of the preparation of the conference program. The liaison should immediately alert the ECI office the moment they are aware of or anticipate any issues with the conference (such as reduced attendance or lack of outside funding)

### During the Conference

The Technical Liaison

- presents general information about the ECI program through a brief PowerPoint presentation at the opening session. He or she is available to answer any related questions. ECI will provide a standard liaison PowerPoint presentation which the liaison can edit to fit their conference.
- works with the chair and members of the Steering Committee to identify future chair candidates for the conference and set in motion the preparation for the next conference in the series.
- works with the chair and the ECI staff to organize a brief meeting of the conference's Organizing Committee to thank the volunteers and to discuss the current conference, particularly any challenges encountered.
- is available to discuss potential topics of future conferences with participants and to encourage submission of proposals for such conferences.
- may also assist the ECI staff person (who is the primary hotel contact) on any questions regarding the hotel that may arise.
- thanks the conference chairs at the conference banquet.

### After the Conference

The Technical Liaison sends a written report to the Executive Director. This report covers the technical aspects of the meeting, whether another conference on the subject will be held, who was chosen as chair, etc.

## SUGGESTED CONFERENCE PLANNING SCHEDULE

Organizing a conference may begin at a previous conference on the same general topic or it may begin with the approval of a new proposal. In all cases a formal proposal is required. The focus of the organizing effort is always the conference chair. The chair may carry the full load or more likely will share it with a co-chair(s) and an organizing committee (usually 4-7 in number representing different geographic areas). However, one person (either the chair, or someone appointed by the chair) is the point of contact with the ECI staff. The schedule below lists minimum lead times followed (in parentheses) by desired lead times. It is **highly recommended** that there be frequent communication with the liaison and ECI Director during the entire process.

### 12 (24-30) months prior

- 1) Select co-chairs (if necessary) and appoint members of the organizing committee. It is desirable to have the co-chair so situated that he/she can take over the chair's responsibilities in the event that the chair is called away from his/her base of operations for an extended period or is otherwise unavailable. Members of the organizing committee often serve as session chairs before and at the conference. We encourage a geographically diverse organizing committee especially if the conference is expected to draw international participation. However, as an organizing committee is usually a working committee, the chair needs to be sure that all the members are accessible.

For conferences with a large number of poster presentations, it is recommended that separate poster chairs be appointed.

Many chairs also appoint an advisory committee and it is recommended that this committee also be geographically diverse.

- 2) Submit proposal (including budget for the support of important speakers) to the liaison and obtain Committee approval. As soon as the proposal has been accepted, a web page is established for the conference. The web page should always contain the latest information on the conference and the chairs should submit updates as soon as, for example, speakers are confirmed.
- 3) Investigate possibility of obtaining outside financial support and begin to contact sources of support funds. Government grant proposals should be submitted through ECI as no overhead will be taken.
- 4) Submit a Mark Your Calendar announcement that is placed on the conference web site and also emailed to the ECI mailing list topical area and any new names that have been submitted to ECI. **Sample Calendar Announcements are found on the ECI website.**

### 12 (18-24) months prior

As proposal is approved:

- 1) Submit technical material for General Announcement/Call for Abstracts for Papers/Posters.
  1. Scope of conference
  2. Range of desired audience
  3. Program outline
  4. Topical areas for oral and poster presentations
  5. Additional email addresses/names and names of journals for mailings.
  6. Number of copies needed for distribution at other meetings.
- 2) Assign responsibilities and chairs for each of the sessions. Frequently the co-chair will handle the Poster Session(s). If large poster sessions are planned, it is advisable to appoint poster co-chairs.

### **9 (18) months prior**

- 1) Submit applications for contributions and government funding through ECI.
- 2) Chair and the organizing committee agree on specific outlines for each session, including suggestions for speakers.
- 3) Session chair to obtain commitments from selected key speakers.

### **6 (8-12) months prior**

- 1) Commitments obtained from all (most) speakers.
- 2) Conference chair provided with (nearly) final list of speakers and final session programs by organizing committee.
- 3) Preliminary version of final program circulated by the conference chair to the organizing committee and others including the ECI office and Technical Liaison.
- 4) Conference chair submits (or has submitted) to the ECI office:
  1. List of invitees if conference will have limited attendance; otherwise the ECI office will open registration to all interested.
  2. Preliminary version of Final Program

***The earlier this is done and the earlier the registration information is posted, the more likely it is that people can plan time away from their office/lab/teaching duties and participate in the conference. Late receipt of the program is most often the major reason for low conference attendance.***

- 5) If there is a conference proceeding, the staff sends information letters to all speakers along with guidelines and links to Author Information.

### **4 (5) months prior**

- 1) ECI staff emails invitation letters or notification that registration is open. The registration information on the web site includes the preliminary program, registration form, payment form, site information, form for hotel reservations either prior to or after the conference.
- 2) Chair and ECI agree on initial support list. ECI will send letters of financial support as contributions and grants are confirmed.

### **3 months prior**

- 1) Conference Chair and Director review amount of financial support available and conference chair informs ECI office of all assistance commitment requests.
- 2) ECI starts preparation of abstract portion of Program.

### **6-8 weeks**

- 1) Review registrations to be sure speakers are registered.
- 2) Chair sends final program to ECI office.

**At conference**

- 1) If either a summary is to be issued or proceedings published, speakers provide electronic copies of their manuscript.

## CONFERENCE FEES AND CHAIR'S FUND FOR 2016

The registration portion of the fee covers all of ECI's operating expenses. ECI operates on a break-even basis.

The fee for a conference is calculated by adding the following components:

- Registration Fee: \$475 (\$175 for graduate students and special circumstances, e.g., third world nation without other support)
- Room/Board and Other Site Costs (such as audio/visual rental, poster board rental, included excursion, etc.), including a small contingency\*
- CSystems online registration processing fee
- Proceedings Fee: At cost, including mailing, unless through Digital Commons/B-Press that charges \$3000 per conference
- Chair's Fund Fee: \$100 (Chair may waive this fee or have a fee greater than \$100)

If the \$100 Chair's Fund Fee is used, the following chart shows the calculation of the Chair's Fund:

<u>Number of fully paid participants</u>	<u>Amount of Chair's Fund</u>
up to 40	\$ 4,000
50	\$ 5,000
100	\$10,000
125	\$12,500
150	\$15,000
175	\$17,500
200	\$20,000
250	\$25,000 plus \$200 for each fully paid participant over 250

\* Typically 10% for series conferences at sites already in use by ECI. An additional contingency may be added for a new conference site or a new conference topic

If a meeting has 40 or fewer fully-paid (non-student) attendees, the chair's fund will receive \$100 per fully-paid attendee.

The chair's fund can be used to support attendees (typically academic speakers and session chairs as well as graduate students) or cover conference-related costs.

## ORGANIZING COMMITTEE

The conference chair should select a co-chair and an organizing committee to assist in planning the conference, and to suggest and obtain leaders and speakers for the various sessions of the conference. ECI suggests that the conference chair make every attempt to have qualified, interested members from the international arena on this committee.

Naturally the members of this organizing committee should be people who are well-informed in the field in which the conference is to be held or the part of the conference for which they are responsible. If possible, the members of this committee should be responsible for obtaining the speakers in order to lessen the workload of the chair. Committee members can also leverage their personal contacts to assist the chair in fundraising. It is also advisable to have a co-chair to assure that schedules are met.

If the conference is not a continuing conference, the committee should also help assemble a list of approximately 100 people likely to attend. Invitations will have to be sent to a much larger number to assure an actual attendance of about 100 participants.

Usually the conference chair will assign a session chair to take care of each session. This person may be a member of the organizing committee or anyone else with the requisite expertise or background in the subject who is willing to assume the task. The session chair should be able to give a brief introduction to the session, keep the speakers to their allotted time, moderate the session, stimulate discussion, and finish with a summary of the session. It is advisable that each session chair has a co-chair to assist with planning and speaker recruitment and to lead the session if the chair is for any reason not able to do so.

Once a conference topic is selected, specific sessions and speakers need to be identified. It is important to consult with leaders in the field about the latest advances relative to the conference. This helps find speakers and session chairs who will ensure vigorous discussion. Members of the organizing committee can split up this work but the chair should take a lead role

Additional suggestions for speakers and session topics can be solicited with an e-mail inquiry to qualified colleagues familiar with the conference topic. Colleagues can also be surveyed about recently completed work in their field and work in progress. They should be asked who is doing the innovative work or taking innovative approaches to the important problems in the field. Innovative approaches usually are the basis of vigorous discussion. If the conference is one of a continuing series, be sure to review speaker suggestions on the evaluation sheets.

As the language of the ECI program is in English, session chairs should take care to be sure that the speakers have a good command of English.

A diverse mix of speakers, from both academia and industry, and the U.S. and abroad should be sought. ECI does not discriminate on the basis of sex, race, age, or national and ethnic origin in any aspect of its program. It is important that the most visible and prestigious part of the organization, the speakers and discussion leaders at the conferences, broadly reflect the technical community. Speakers should be told in advance the time allotted for their presentations and reminded to leave time for discussion. They should be encouraged to follow a format that includes a brief introduction explaining the problems to be addressed and the significance of the topic. Technical terms and jargon need to be defined for the benefit of non-experts in the field as participants are drawn from a wide range of disciplines. Speakers are expected to present new work/cutting edge research (no recycled or previously published presentations) and are encouraged to be present during the entire conference so they can interact with attendees on a personal basis.

The ECI staff normally will communicate on conference matters only with the chair (with a copy to the technical liaison) unless the chair has requested that direct ECI contacts be made with a designated individual.

## **ORGANIZING COMMITTEE EXPENSES**

Expenses for organizing committee members are generally met by their own organizations; however, reasonable and necessary expenses incurred by committee members in preparation of a conference that are not met by their organizations may be reimbursed by ECI from the Conference Chair's Fund with prior permission of the Conference Chair. Reimbursable items include: travel to a meeting of the conference organizing committee, communications and postage costs.

The Chair's Fund may also be used to partially cover conference expenses of participants.

The Conference Chair must notify ECI in writing regarding any distribution he or she wishes to make from this fund.

For auditing purposes, the ECI accountants require that receipts be kept for expenditures and sent to ECI at the end of the conference.

## CO-SPONSORSHIP BY/COOPERATION WITH PROFESSIONAL SOCIETIES

### AIChE

Herman Bieber

AIChE co-sponsorship offers several advantages to the conference organizing committee:

1. AIChE mailing lists and labels for relevant divisions will be made readily available.
2. AIChE publicity may be available gratis in AIChE publications, i.e., CEP, AIChE Extra and/or Division newsletters.
3. Help and guidance from an AIChE representative on the organizing committee to make it more relevant and known to chemical engineers, thereby increasing attendance.
4. Coordination to help prevent conflicts with AIChE conferences on the same subject that would diminish attendance at both.
5. The AIChE would be made available for notices, etc.

The AIChE criteria for co-sponsoring an ECI conference are:

1. The subject is of interest to chemical engineers.
2. The ECI conference is not time-competitive with a major AIChE conference on the same subject.
3. AIChE is adequately represented on the organizing committee (as a co-chair or committee member.)
4. There is no financial obligation on the part of AIChE except where AIChE agrees from the beginning to be the principal sponsor.

**See Appendix P for a sample letter.** Be sure to include a copy of the ECI Conference Proposal or other documentation giving the subject, date, location, names of co-chairs, etc.

## CONTINUING (SERIES) CONFERENCES

Continuing (or series) conferences constitute a significant portion of the ECI program each year. Chairs of these conferences have some distinct advantages in terms of organization, but they also have special responsibilities. For any continuing conference, the chair must convene an organizing committee meeting prior to the close of the current conference for the purpose of determining whether another conference is to be held, the desirable interval before reconvening, and who will serve as chair, co-chair and members of the organizing committee.

The same chair may serve again but if not, then it is desirable for a chair and co-chair to be selected. In many of the continuing conference series the co-chair serves as a subsequent conference chair; however, this is not mandatory.

For a conference that will be held outside of North America, one of the co-chairs should be from the U.S. or Canada; however, this is not mandatory if active members of the organizing committee are from North America. If the organizing committee is very active and the members are in frequent contact with each other, they may wish to select one of their members or follow other procedures. Frequently the liaison is active in this process.

The chair should inform the ECI office of these decisions immediately after the meeting, and the new chair should then submit a conference proposal for consideration by the Conferences Committee. This approval is required for all conferences before the conference can be placed on the Conferences Calendar and before extensive planning can go forward. **See Appendix A for the format of a proposal for a continuing conference.**

ECI will inform the chair of the unspent chair's fund monies, if any, carried forward from the previous conference.

The formation and membership of the organizing committee may be completely informal or it may be prescribed according to a traditional procedure. All conference participants must be informed of the continuation procedures and given the opportunity to provide input into this process.

ECI has compiled a database of participants in continuing conferences for the purpose of announcing future meetings. (ECI policy prohibits use of these participant lists for any other purpose.) This reduces the burden on the chair and organizing committee in obtaining invitation lists since these past attendees will receive regular announcements. However, organizing committee members should be encouraged to submit names of new researchers and organizations where they believe there is interdisciplinary interest.

The timing between conferences and the development of the program are most important. The interval between conferences must be such as to allow new developments in the field. Most are two to three years, but others are shorter and some are longer.

The organizing committee must make a special effort to ensure that speakers present new material, not tutorial reviews or restated presentations. People with innovative new ideas and research and those working in interdisciplinary areas should constantly be sought as program participants.

With all conferences, series or not, the best mailing lists and the most stringent adherence to deadlines are no substitute for a program offering intellectual stimulation and the opportunity to discuss today's problems and tomorrow's opportunities with those who are easily recognizable as one's peers.

## **STEERING COMMITTEE FOR CONTINUING (SERIES) CONFERENCES**

Because a major goal of ECI is to ensure that the conferences are run as smoothly as possible, it is recommended that continuing (or series) conferences aim to promote best practices, standardization, and ensure good service.

As a measure to ensure continuity and achieve the above goals, ECI recommends that continuing (series) conferences form a Steering Committee for all of the meetings to supplement ECI staff and liaison interactions. These Steering Committees should be composed of current and future chairs, and a subset of past chairs who have shown dedicated service to the series.

The obligations of the Steering Committee members are modest. The function of the committee will be to provide guidance to the Meeting Chairs, establish policies for the meeting series, provide global guidance on the meeting series direction, and assist the conference liaison with the Chairs' interactions with ECI and other organizations. Steering Committee work will be conducted at the Conference, via e-mail, and at interim teleconferences where needed.

The Steering Committee will not supplant the Conference Advisory Board/Organizing Committee, whose main function is to provide scientific and other input on the specific conference to the meeting's Chairs. Rather, its function is to make the conference organization less of a mystery and more of a pleasure to the Chairs, and to ensure the overall series success.

## LENGTH OF CONFERENCE

The conference period is typically four and one-half days, and comprises nine sessions. Recently, however, because of time constraints on participants, many conferences are held for either four days or three and one-half days. Usually, the sessions are scheduled in the morning and late afternoon/early evening, leaving the major portion of the afternoons available for *ad hoc* meetings, poster sessions, informal group discussions, recreation, etc.

Typically, registration is on Sunday afternoon and is followed by an opening reception and dinner. Formal sessions begin Monday morning and the conference concludes with lunch on Friday (or Thursday). Occasionally an opening keynote talk or an opening session is held Sunday evening, but it is best to keep Sunday's program short as participants are usually tired from traveling to the conference site. As participants may still be arriving, the session should be one that can be missed without great consequence. However, if a keynote is scheduled for Sunday night, ECI will make every attempt to highlight this so that people can make appropriate travel plans.

Permission for any proposed deviation from the above schedule should be discussed with the Technical Liaison and ECI Executive Director.

## CONFERENCE SITES

The conference chair should discuss the pros and cons of various conference sites with the Executive Director as early as possible in the process. The chair can indicate a preference of site and date for the conference; however, the choice of both sites and dates is the responsibility of ECI. Under no circumstances may a chair or members of the organizing committee commit to or otherwise negotiate with a site.

**Appendix B lists current sites.** Sites were chosen by ECI for their attractiveness, ease of transportation, adequate meeting and poster space, good food and service and, most important, cost. ECI strives to make the overall conference fee as low as possible.

The expected size of the conference must be taken into account when choosing a site. The time of year a conference is to be held must also be considered as ECI strives to avoid "high" or "tourist" season when hotel room rates are much more expensive.

The available sites are assigned on a "first come, first served" basis. A few conferences each year may be held at sites new to ECI conferences; however, the work involved in holding a conference at a new location is substantially greater than normal, and the ECI staff is limited. Nevertheless, if a conference chair has valid and convincing reasons for using a different site, consideration will be given to this request providing that it is made sufficiently in advance to allow thorough investigation. If different sites are to be considered, accessibility and transportation costs for most participants should be taken into account.

Conferences of continuing series with a large international attendance frequently alternate sites, e.g., North America, Europe, Pacific Rim, etc.

All sites must be in compliance with Federal regulations as specified in the Americans with Disabilities Act.

All sites are informed that ECI conferences are smoke-free. We attempt to provide a safe and healthy environment for all attendees. Therefore, smoking is prohibited in all meeting rooms, banquet halls, and during all conference activities.

## PROGRAM AND FORMAT

### **NOTE: See Appendix M for Additional Thoughts on Conference Content**

The program and format of the conferences are left to the judgment of the chairs and committee. However, there are general guidelines that should be followed to ensure consistency with the overall conferences program. Some examples of formats that have proven successful in developing dialogue and attracting sufficient attendance are outlined below:

1. Presentations of two or three papers per session with an in-depth discussion following each paper. It is important that chairs and/or organizers remind speakers that clear, concise visuals are essential for effective presentations. This means only one concept per slide.

Speakers with special projection requirements must make this known to ECI well in advance of the actual meeting.

2. Short presentations by three to five panelists in each session with discussion following their presentations. Long programs should be avoided in the evening; two or possibly three speakers are more than adequate.
3. Plenary sessions in the morning with workshops on specific subjects in the evening. Generally this format makes use of workshop summaries on the last day with a discussion of conference accomplishments and recommendations.
4. Presentations of a number of short talks or progress reports on a special field of the conference subject, followed by discussion. This is usually done in conjunction with one of the other formats.
5. Poster sessions as a communications medium at conferences have been highly effective when program time and structure does not allow all papers to be presented orally, particularly if conference participation exceeds 80-100 people. It is advisable that a member of the steering committee be assigned responsibility for reviewing and accepting poster abstracts. Poster space needed should be discussed with the Director so that proper arrangements can be made.

For larger conferences, frequently two distinct poster sessions are held. For example, the first set of posters will be on display Monday and Tuesday with the "official" session scheduled for Tuesday, and then a second set of posters will be on display on Wednesday and Thursday with the second "official" poster session scheduled for Thursday. If these arrangements are made early in the planning stage, the ECI will endeavor to arrange for coffee, dessert or beer/wine to be served at the sessions. Another alternative is to have all posters on display throughout the conference, with presenters of odd or even numbered posters required to stay with their presentations during designated sessions. This allows poster presenters to browse the other presentations when they are not required to stay with their posters.

**The ECI web site contains poster preparation information. This information is also in Appendix K.**

6. Some very successful conferences consisted of all posters and discussions. Each poster presenter was given five minutes to "present his case" and the session chairs acted as discussion leaders.

It is important that the program be given adequate structure. We believe that spontaneous discussion will develop by providing ample free time for unstructured activities in the overall format. However, programs that have expected spontaneous discussions to develop on conference topics but did not provide some reference point in terms of speakers or discussion coordinators have not been successful in attracting participation.

Session leaders need to ensure adequate that time is left for discussion after a speaker's presentation. The amount of time for questions and answers should be related to the length of the preceding presentation, i.e., 5-10 minutes for a 30-minute presentation, 10-15 minutes for a 45 minute presentation, etc. Free time in the afternoons and at social hours is another valuable part of discussion time and the conference program should not intrude on these *ad hoc* discussions.

No material may be published without an author's approval. A great deal of latitude is available to an author to explore many new fields and to have the conference function as a sounding board for a new or controversial facet of a specific problem. Considerable discussion by the various participants is highly desirable.

## PROGRAM PROBLEMS AND HOW TO AVOID THEM

Some of the most frequent comments a conference receives on the Conference Evaluation Forms are listed below followed by suggestions.

### *Not enough discussion*

Make certain that the session chairs keep speakers to the pre-arranged time that allows time for discussion. A speaker who ignores his or her time constraints should be interrupted. Distribute the Guidelines for Session Chairs (in this manual) and review contents with the session chairs.

### *Too many presentations*

Avoid the parade of 10-minute talks in favor of expanded poster sessions. Participants expect a reasonable amount of discussion after each talk and this is next to impossible with many short presentations.

### *Long evening sessions*

If the conference has sessions after dinner, consider three speakers as the maximum for this as conference participants will have just eaten a large meal and may be quite tired by the end of the day. Poster sessions work better after dinner, as participants are walking among the posters and staying active.

### *Narrow focus*

Early discussion with the organizing committee is vital to defining the scope of the conference.

### *Too much review material*

Early discussion with the organizing committee is vital to defining the scope of the conference. Speakers must be told to balance their presentation with an introduction, new material and perhaps speculation, and discussion.

### *Speakers jump into subject without giving any background*

Remind speakers that the conferences are interdisciplinary and they must introduce their subject matter so that all participants can benefit from their presentation. It is particularly important that any jargon be defined.

### *Not enough free time*

Although participants come to an ECI conference expecting to work hard, they must also have free time to refresh and rejuvenate themselves, and also to exchange technical information in an informal atmosphere.

### *Domination of discussion by a few participants*

Session chairs must be told to be prepared to lead the discussion and be in control of it.

## SELECTION OF ATTENDEES

ECI has adopted what is essentially an open application process for the vast majority of its conferences. With publicity and invitations issued as outlined elsewhere in the manual, there is generally little danger of having an overflow attendance. On a timely basis, the ECI staff sends to the conference chair lists of all those who have requested to be on the conference mailing list.

After the invitations are sent, the ECI staff will send a list of registrations on a weekly basis to the chair. In this way the chair is kept informed about how registrations are developing and which speakers are registered.

The ECI office also monitors speaker registrations and sends reminders to them, if necessary.

Some conferences can be expected to attract a higher than average attendance, higher than either the hotel can handle or what is considered desirable on the part of the ECI and the chair because of the type of conference and its goals. In these cases not all applications can be accepted and special application procedures must be arranged based on prior discussion between the chair and ECI. Questionnaires to the applicants may be used and should be completed so that formal acceptances and confirmations can be mailed no later than three months prior to the conference.

If a conference appears to be in danger of being over-subscribed, the ECI staff, in conjunction with the conference chair, will also establish a wait-list.

If the chair wishes to modify any of the above procedures, he or she should discuss the proposed changes with the Director.

## POSTER SESSIONS

Poster sessions play an important role at ECI conferences. At many ECI conferences, practically every attendee participates as either a speaker or as a poster presenter. The use of posters is an excellent vehicle for reporting recent research and eliminates the need for a parade of short oral presentations. (The chair should keep in mind that many corporations and universities require an employee or student to make a presentation at a conference in order for permission to attend be granted.)

Each poster session can readily absorb about 30 posters. If the total number of posters is expected to be larger, additional time periods should be set aside for different poster sessions. For example, half the posters would be featured on Monday/Tuesday and the second half on Wednesday/Thursday.

Depending upon the number of posters being presented, poster sessions should be approximately one to two hours in length and authors are expected to be with their posters for this period to explain their work to other conference participants.

Poster sessions should be held during regularly scheduled conference times that may be part of or in addition to the normal sessions, and preferably not during time reserved for recreation or other activities. Chairs may schedule a poster session after lunch with dessert/coffee being served in the poster area, or a poster session can be scheduled in conjunction with a late afternoon or evening social hour with wine and beer served in the poster area. Poster sessions held after dinner have proved effective as well.

Participants submitting papers must be advised before final acceptance of the paper whether their submission is scheduled for an oral presentation or for a poster session. A paper relegated to a poster session is not necessarily of lower quality than oral presentations. Session papers are chosen to present a cohesive, focused picture and this may involve difficult choices by the organizing committee.

Chairs should inform authors when a poster is rejected and why. This avoids the embarrassment of a participant arriving ready to present a poster that was not accepted.

Authors who are not used to developing posters frequently try to put too much information on a poster with print that is too small. ECI has guidelines (See Appendix L.) that are also posted on the ECI website under Information.

## CONFERENCE ANNOUNCEMENTS AND PUBLICITY

The ECI website (<http://www.engconfintl.org>) contains an updated calendar of conferences, general announcements, and preliminary programs. A separate publicity list that includes about 225 journals and technical publications also receives the calendar.

Potential participants can electronically send their conference application to ECI and also register on line.

For each conference, a preliminary or "mark your calendar" announcement is emailed to potential attendees as soon as date and place have been established. This announcement is sent to journals as well as to recent attendees of continuing conferences and, for new conferences, to the chair's mailing list. If the conference is behind the anticipated schedule, this announcement may be skipped in favor of the general announcement.

The "mark your calendar" preliminary announcement is followed by a general announcement that also is sent to journals and a larger emailing list. This announcement gives some information about specific areas to be addressed, some of the session topics, and if possible, the names of speakers and session chairs. This announcement also serves as a call for additional papers and/or posters.

Regardless of the interest that develops from the announcements and publicity, the most significant portion of the attendees tends to come from a list of names that the chair and the organizing committee have compiled this list containing persons to be specifically invited to attend.

Experience has shown that about 125-150 people is the largest number that can work effectively at a typical ECI conference, although several of the very successful biotechnology conferences were quite effective with 200 or more participants - especially if poster sessions were used. Attendance at ECI conferences generally falls between 60 and 125; however, it is usually necessary to send invitations to many more than this number. Substantial attention must be given to the quality of the list in terms of known interest in the subject to be discussed and to the accuracy of the addresses.

## **PROGRAM / ABSTRACT BOOK**

Typically the program book will contain the program, list of sponsors, list of posters, one-page abstracts, history of the conferences program, participants list, and room for note taking. These materials may also be posted online for conference attendees to download electronic copies. Conference chairs may consider printing only the program portion of the booklet with abstracts distributed electronically to attendees prior to the conference.

As the program book is shipped to the conference site at least a week before the start of the conference, it is essential that the final version of the program be sent to the ECI at least three weeks before the conference.

After the conference, the program will be posted to the ECI website Past Conferences section and both the program and abstracts will be placed on the ECI Digital Commons site.

## CHAIR'S CONFERENCE FUND AND GENERAL FINANCIAL INFORMATION

The Chair's Conference Fund is a sum of money provided through the conference fee that can be used in various ways by the conference chair(s). It is frequently used to support pre-conference planning and then in assisting those whose presence would be valuable to the conference but who are unable to pay the full conference fee.

All conference participants, regardless of whether they are involved with conference planning or have a place in the program, are expected to stay for the entire conference period, live at the conference site, and pay the full conference fee which includes meals, lodging, rental of space and equipment, taxes, gratuities and a basic registration fee that covers ECI overhead (salaries, rent, web site, publicity, etc).

While this policy assures the best overall attendance in terms of those who make an active contribution to the conference program, ECI recognizes that there are times when certain exceptions must be made, especially when individuals or organizations with which they are affiliated do not have sufficient free time or adequate resources to underwrite the cost of their attendance. The chair, with the approval of the Executive Director, may authorize a small number of exceptions, but should confer with the Executive Director before this is done and present this list in writing. For those staying one or two nights, the hotel and meals portion of the conference fee is typically pro-rated (except for conferences where there is a waiting list).

Chairs are authorized by the Executive Director to commit a modest amount of money toward defraying all or part of the conference fee and/or providing travel assistance to those people who might otherwise be unable to attend, and whose presence is felt to be essential. The chair is generally free to allocate this assistance, up to the ceiling amount authorized by the Executive Director, as he/she feels will best contribute toward the success of the program. However, there are some specific restrictions:

1. Subsidy commitment to attendees is not firm until confirmed in writing to the participant by the Executive Director (or designated ECI employee).
2. A blanket waiver of conference fees is not permitted. All people including speakers, program participants, organizing committee members, etc., must pay the conference fee unless granted a specific individual waiver that has been approved by the Executive Director.
3. In general, travel assistance cannot be paid to people who are going to be at the conference site fewer than three days. Those receiving financial support are expected to remain at the conference for at least 24 hours after they speak so that other participants may interact with them.
4. Only the conference chair is authorized to make financial support commitments on behalf of his/her conference regarding financial support and/or payment of travel assistance, and this should not be done until the Chair and the Executive Director (or designated ECI employee) are in agreement on the amount of support funds available. This authority cannot be delegated. All commitments will be followed up by an official letter of confirmation from ECI (with copy to the chair) to the individual receiving assistance. It is the responsibility of the chair to inform members of his/her organizing committee, session chairs, etc. that only he/she can make financial commitments. There must be continuing discussion with ECI to be sure that commitments do not exceed funds. *Grant funds do not always come through and must not be committed until officially awarded!* Once an official grant award letter is received, awarded funds can be committed to supporting attendees according to the language of the award.
5. Financial commitments to specific attendees should be sent by the chair to ECI as early as possible, but in no case later than six weeks prior to the start of the conference in order to maintain proper accounting records. A final summary of commitments must also be received no later than three weeks prior to the conference starting date. Cooperation in this procedure will limit the possibility of embarrassment arising in situations where people are led or choose to believe that a

promise was made when none in fact had been, or when bills are sent where a commitment has not been made for reimbursement.

6. Payment of honoraria is prohibited by ECI policy. This, as well as the other restrictions, applies to all funds for which ECI acts as custodian.
7. If any travel fund contributions come from U.S. government sources, all travel for which reimbursement is made, in whole or in part, must be done by an American flag carrier, in so far as possible. Any exceptions must be authorized by ECI. If the only funding comes from the Conference Chair's Fund, the lowest cost carrier must be used. ECI will not reimburse for business or first class – only economy class.

When allocating financial assistance, the chair should work as closely as possible with the ECI staff. Inevitably there will be special circumstances requiring flexibility and for which a solution can usually be found.

The conference chair should get from the Director as soon as possible a firm commitment of the amount of assistance that is available from ECI. There are some general points about the use of the conference fund that are helpful in making allocations.

1. Chairs are urged to discuss special financial needs early when they anticipate demand exceeding the available amount. Government and/or corporate assistance for invitational travel grants is often available, particularly for foreign attendees. The National Science Foundation, the National Institutes of Health, Department of Energy, Environmental Protection Agency, Department of Transportation, Department of the Army, Navy, Air Force, etc., are possible sources of assistance.

Chairs may also solicit donations from industry, private individuals, and foundations. ECI must receive all contributions and in a manner consistent with its status as a non-profit organization, thank the donor (cc: the chair), account for, and disburse the funds.

2. Expenses of participants are generally met by their organizations. The assistance fund is best used for seed money; an offer of a nominal grant will often enable an attendee to raise the balance from his or her organization.
3. Some individuals will desire massive support, preferring to save their travel resources for future needs. ECI does not encourage the complete support of an individual's expenses, and since the assistance fund is limited, it is sometimes necessary to negotiate a sum agreeable to the individual and the chair.
4. Government employees are generally expected to pay in full. The fee structure is usually set so that room and board are within the allowable Federal per diem. For these people, special billing itemizing charges for room, board, and registration can be arranged. Federal and other government agencies frequently do the issuance of an advance purchase order covering the conference fee, with ECI billing the agency directly. A completed registration form accompanied by an official purchase order is considered paid for the purposes of confirming the registration.
5. Industrial representatives, particularly those from larger corporations, will normally not require or expect assistance. Often an official letter of invitation is necessary to satisfy management's questions concerning the conference benefit. The letter usually comes from the conference chair in the name of the ECI, but may also be sent by the Director. It should be noted that many companies require a presentation by their employee as a condition for approving attendance. Hence discretion should be used in rejecting posters.
6. Any funds remaining from the chair's fund are carried forward to the next conference in the series.

*ECI will comp the conference fee for one graduate student who will be in charge of the AV for the conference. The conference chair is entitled to appoint this student. ECI does not provide travel reimbursement for this student.*

## **FINANCIAL ASSISTANCE BY OTHER AGENCIES**

For most conferences, it is desirable to seek additional funding from other agencies, through grant or contract, to supplement the chair's Conference Fund. No overhead is taken on any funds raised for conference support. Because of the time involved in preparing grant applications, it is advisable to begin to seek additional funding for a conference as early as possible and at least eight months prior to the conference start date.

With certain exceptions (e.g., grant proposals submitted through universities and funds transferred to ECI), It is mandatory to have any funds for external sponsorship of conferences submitted through the ECI. ECI receives the funding and is accountable for the monies. This will, among other aspects, avoid possible tax problems for the conference chair.

External sponsorship may be used for any appropriate purpose related to the conference, such as partial conference support for participants or graduate students, travel costs for special invited speakers, and to cover the cost of publications.

### **A. Government agencies**

Successful large conferences generally depend on additional external funding from sponsors that may be government agencies such as the National Science Foundation, Environmental Protection Agency, National Institutes of Health, Department of Transportation, Department of Energy, etc. ECI does not charge any overhead on these grants; all monies received go directly to the purpose for which they were solicited. ECI will acknowledge such support, usually in either listing these agencies as co-sponsors (usually reserved for governmental agencies) or as contributors. ECI has all the necessary registrations to apply for government grants (NIH eRA Commons, grants.gov, CCR, SAM, etc.).

The conference chair or another designated conference organizer normally makes contact with the most appropriate program officers in the agencies to discuss the conference and gauge the possibility of a grant award being made. The ECI Associate Director can provide guidance in identifying the appropriate contacts at various agencies and will provide examples of successful previous proposals if available. If a favorable response is received from a program officer, the chair or designated conference organizer will begin to prepare a proposal.

The Associate Director will work with the chair or other conference organizer designated as a grant proposal's Principal Investigator (PI) to prepare all necessary materials for the proposal. For grants from US agencies, the PI generally needs to be a US-based academic. For grant proposals to international branches of the US government, such as the Office of Naval Research Global Office, the PI and awardee organization must be based outside the US. In these cases, awards would be made to a university/organization outside of the US and then transferred to ECI after they are received by the awardee institution.

### **B. Private corporations**

Depending on the topic of the conference, the chair usually has a good idea as to which private corporations might be interested in making a donation. In the case of continuing conferences, ECI has a list of contributors to previous conferences. ECI can also provide information and contacts for companies who have sponsored conferences on similar topics in the past.

The conference chair will work with Associate Director to establish appropriate sponsor benefit packages. These packages will be posted on the conference web site and sent to prospective sponsors along with a fundraising letter. Examples of benefit packages and fundraising letters are available in Appendix Q.

The initial request for funding should come from the conference chair. Once a sponsor has agreed to provide funds, the pledge of support (typically an email) is forwarded to the Associate Director, who will work

with the sponsor on all aspects of sponsorship (invoicing, collecting ads/logos, payment reminders, etc.). The Associate Director will maintain the master list of all funds pledged and received. In cases where an electronic application for funding is required by a company, the Associate Director will submit the application. The conference chair may need to provide assistance with some technical portions of an application.

When contributions are received, ECI routinely sends thank you letters to the corporation (and copies to the chair. The U.S. Internal Revenue Service requires corporations making contributions to not-for-profit organizations with a 501(c)3 IRS designation to obtain written confirmation of any donations. ECI provides such confirmation.

ECI works to quickly reimburse all supported travel after the conference (after the receipt of the necessary documentation).

Continuing conferences typically carry forward any unspent contributions to the next conference in the series.

## REGISTRATION OF SPEAKERS AND SPEAKER SUPPORT

All speakers must complete their registration with payment of conference fee less any support that has been confirmed in writing by ECI. This point cannot be over-emphasized, and must be adhered to even when a speaker, session chair, etc., has been offered financial support verbally.

In case a speaker has not submitted a conference application/request for next mailing, ECI will contact the conference chair for the speaker's contact information so that registration information can be sent.

All participants are encouraged to stay for the entire conference as a core value of ECI conferences is that participants will have ample opportunity to interact with all other participants. Some plenary or keynote speakers may only be able to commit to stay for a limited time. The advantages of having such a person present at the conference needs to be balanced against the disadvantages of not having that person available for discussion through most of the week.

The chair needs to establish with plenary/keynote speakers how long he/she plans to attend a conference. If a speaker is leaving early, participants should be told of the limited time for informal discussions with the speaker.

ONLY CONFERENCE CHAIRS ARE ALLOWED TO MAKE FINANCIAL COMMITMENTS FROM THE FUNDS ALLOCATED TO THEM, BUT THIS CANNOT BE DONE WITHOUT FIRST OBTAINING CONFIRMATION FROM ECI. In the past there have been incidents of session chairs or other people, without any authorization from the conference chair, indicating to speakers that they do not have to pay simply because they are participating in the program. Ultimately, this only causes embarrassment for all concerned. Therefore, ECI has initiated a procedure for notifying those persons to whom support has been offered. **Upon receipt of a support list from the chair, ECI will send written notification of support to these persons with a copy to the chair.** The chair's cooperation in making these financial commitments will help the ECI staff keep these situations to a minimum.

The procedure for allocating assistance to selected participants is outlined in the section of this manual on the **Conference Chair's Fund and General Financial Assistance**. As travel costs can be highly volatile, we suggest that support for travel be capped at a reasonable maximum value. This will encourage support recipients to make economical travel arrangements.

A note of caution: A chair should never indicate to a speaker or other participant that he or she will "cover travel expenses". *A specific amount must always be mentioned.*

We also suggest that conference chairs consider supporting participants at the shared-occupancy fee to make a more widespread use of grant funds. Recipients may then pay the surcharge for single occupancy if they so choose.

## PUBLICATION OF PROCEEDINGS

ECI encourages the publication of papers given during a conference or findings from the conference. With very few exceptions, the funds available to the chair cannot cover the cost of publication and additional funding must be sought or added to the conference fee. If outside funding is not forthcoming, a reasonable estimate for the cost of an individual publication is added to the conference fee.

Chairs should not contract with publishers, except when ECI has specifically authorized them to do so in their capacity as editor. The ECI staff should be informed about publications costs so that the pro-rated cost per participant (plus postage) can be added to the conference fee

ECI is not set up to market or assemble any publication. Thus, in most cases, a technical society that is co-sponsoring the conference will be selected to be the publisher and marketer but, given good reason, another publisher may be chosen. Depending on the organization that acts as publisher, copyright issues may enter. ECI prefers an arrangement where any conference paper can be published elsewhere provided credit is given to the ECI program (and to ECI as the copyright holder).

ECI is pleased to provide its conferences with an electronic publishing option in conjunction with The ECI Digital Commons, powered by the Berkeley Electronic Press. The Series electronically publishes presented papers and other materials such as presentations, data sets, and video files associated with ECI conferences. It provides conference organizers with a highly visible, rapidly disseminated publication outlet, a branded site (with links back to past conferences or to sponsoring bodies, for example), and customized policies (e.g., will materials be peer reviewed). Please visit <http://dc.engconfintl.org/> to get a better sense of the platform, or contact coordinating editor Franco Berruti (University of Western Ontario) at [franco@bepress.com](mailto:franco@bepress.com) for more details.

Most conference publications are published after the conference. In some instances though, chairs have preferred pre-conference publications; however, because of the strict time deadlines involved, ECI does not recommend pre-conference publications.

Arrangements for publication of a conference proceedings must be made very early during the planning stage. If conference proceedings are to be published, participants submitting papers must be advised prior to their acceptance, whether their papers are to be included in the publication (in some instances, poster papers might not be included), what page limitations may exist, whether there is any copyright assignment, whether copies of the proceedings will be mailed with/without additional charge to the participants, and what the deadline for the final manuscript will be. The ECI staff will work with the chair to produce an "Author's Kit" for the web site that will include the necessary information for preparation of the manuscripts. Typically, the society or journal that will publish a proceedings has their own set of instructions and ECI can post a link to these on the ECI web site.

Normally, publication will take place directly from the author's original material. Authors should be warned that printed publication budgets usually do not allow for color reproductions. If color reproductions are to be included (not recommended), a special payment by the author may be required.

ECI does not have the staff to do the secretarial and administrative work connected with the collection of individual manuscripts and their distribution to referees for review.

## ASSISTANCE FROM THE ECI STAFF

The ECI staff is ready to assist a conference chair in any matters dealing with the conference and to offer any advice that may be pertinent to a given conference based upon the experience of the organization in such matters.

In general, ECI is the administrative and fiscal agent for the conferences, billing participants, paying charges incurred at the various venues, distributing the information concerning the conferences, contacting possible attendees, and providing publicity releases for the conferences. The source of funds for this work is derived from conference registration fees.

The Conferences program is mandated to operate on a breakeven basis and does not have endowment funds.

The ECI staff also takes care of the registration of the participants, makes arrangements with the sites at which the conferences are to be held, and is financially responsible for any deficit that may occur due to the attendance at a conference being below the normal break-even point.

Specifically, in order to aid the chair in planning a conference, the following is a listing of various procedures that are carried out by the ECI staff:

1. All arrangements for dates and conference venues for ECI conferences are done through the ECI staff.
2. A calendar listing scheduled conferences is always available on the ECI web site.
3. The conference announcements (with technical portions prepared by the chair or the chair and liaison and venue information prepared by the ECI staff) appear on the web site and are also e-mailed to the ECI mailing list as well as to specific organizations, universities, etc., as requested by the chair.
4. The ECI staff keeps the chair informed of those who have requested information about the conference
5. Conference registration should open at least three months prior to the conference. Thus it is vital that the chair follow the conference timeline and present a preliminary program to the ECI staff prior to this. The complete though possibly preliminary program, a letter of invitation, a registration form and payment form, and general information including data on the site and travel appear on the web site and are e-mailed to those interested in the conference.
6. When registration and payment are received, an invoice or receipt is sent to the registrant. Participants are expected to register at least 45 days prior to the start of the conference. After that time a "late fee" is assessed. (Most hotels need the final list of those requiring rooms at least 30 days before the conference. In some cases the contracted fee may not apply and the room is billed at rack-rate.)

7. At times conference chairs wish to have additional background information sent to participants. The ECI staff can handle this electronically. Requests for information from participants and others are handled by the ECI staff.
8. Programs for each conference are printed by the ECI office. In order to ensure sufficient time for duplication and site delivery, the chair must provide the ECI staff any changes in the final program at least three weeks prior to the conference. A copy of the Participants List is kept at the registration desk and participants are asked to update their information by logging into their ECI account. Conference participants receive an updated Participants List by e-mail after the conference.
10. Following the conclusion of a conference, any comments that are taken at the conference are screened by the staff. Any suggestions for new or follow-up conferences are referred to the Conferences Committee. (Final items, such as distributing a summary report, can be handled by the ECI staff.) If the chair believes that the summary may be suitable for publication in "Summaries of Conferences", he or she should indicate to which journals, if any, the summary should be sent.
11. Payments for registration reimbursement and/or travel assistance, when approved, are handled by the ECI staff. In all cases where the travel reimbursement is 50% or more of the total travel cost, the original travel receipts must be supplied. If less than 50%, the claimant may submit copies of receipts along with evidence that the amount claimed from ECI has not been reimbursed by another agency. Scanned copies of original receipts are acceptable for reimbursement.

## **CONFERENCE WEB SITE and ABSTRACT SUBMISSION SITE**

Our web site (<http://www.engconfintl.org>) is the key component of the announcement and other conference information distribution. It contains all the information distributed prior to the conference itself including application, conference program, and registration and payment information. Conference venue and transportation information are also posted on the web site along with any other details relevant to the conference.

The web site contains guidelines for speakers and poster presenters and also answers to frequently asked questions about ECI conferences.

Once the conference is listed on the calendar, people wanting to be placed on the mailing list for the conference may make this request electronically on the web site.

The web site will have a link to online abstract submission, handled by [linklings.com](http://linklings.com). Submitters will create an account prior to uploading an abstract, and will be able to edit their submission at any time prior to the abstract deadline. An abstract template is provided on the site, and abstracts are uploaded as Word files (and can contain graphics, figures, etc.).

The site allows the conference chairs and any others who they wish to have access the ability to view all submitted abstracts in real time. The site allows for designated oral and poster submissions, and submissions can also be steered to specific session topics. Abstracts can be marked as accepted or declined, and program sessions can be assembled using the linklings site.

When abstract acceptance opens, the ECI Registrar will email the chairs and any others who are to have access with instructions on how to view all abstracts submitted to their conference. The Registrar will also provide detailed instructions for using the linklings site.

We are interested in continually improving the contents of the site and hence are interested in any suggestions you may have for general improvements or for specific enhancements for your conference. For example, are there any links to other sites related to the content of your conference that could be included in a Related Web Sites category? These might be sites of major research efforts, professional societies, government agencies, etc. A link can also be established with the chair's own web site.

## **QUESTIONNAIRE/CONFERENCE EVALUATION**

Toward the end of the conference, the ECI staff will electronically distribute a questionnaire/evaluation to conference participants. After the conference the information will be given to the conference liaison, the conference chairs, and the next chairs in the series. The evaluations also ask for volunteers for the next conference and suggestions for new topics.

## **SOCIAL ACTIVITIES AT THE CONFERENCE**

Dress - ECI conferences are informal and casual dress is recommended.

Social Hours - It is a tradition of ECI conferences to have one welcoming reception on the first day and one social hour per day set aside for participants to discuss the activities of the day and to become better acquainted. At the conclusion of dinner or of the evening's technical program, soft drinks, beer and wine may be served either in another area of the venue or in the poster area.

Recreation - Depending on the location chosen for the conference, different recreational opportunities are available and these will be posted on the web site along with appropriate links to tourist information.

Excursions – ECI recommends an optional excursion during the conference to an area with cultural, historic, or technical relevance as these excursions help promote the exchange of technical information in a relaxed environment. Discuss with the ECI staff the various options available for the conference site.

Guest Program - Unfortunately, the ECI office does not have enough staff to plan a guest program. The staff does try to provide links to recreational information on sites as well as contact numbers for additional information. If a guest program is important to you, it might be appropriate to appoint a committee member to organize it; however, the organizer should be in contact with ECI to be sure that no conflicts develop with the program and that the guest program is either self-supporting or that there are funds available to support it.

## **ON SITE ASSISTANCE**

Staff assistance at the conference site is provided to handle registration, oversee the administration of the conference, act as liaison with the hotel, etc.

ECI will fund the conference fee (not transportation) of a graduate student who will help with AV during the conference. Please contact the Executive Director or Registrar to identify such a student.

## INFORMATION AND GUIDELINES FOR SESSION CHAIRS

The objectives of the conference are to bring together an interdisciplinary group of individuals to exchange their expertise and experiences in many areas with cooperation and friendship, and to further stimulate their research and development activities. This can be achieved by well-organized presentations by the oral and poster presenters as well as by providing ample time for discussion after the oral presentations to stimulate further interest and understanding of the subject. The role of chairs is to provide a leadership role and run the sessions most efficiently and smoothly. Although you are familiar with the role, here are some guidelines that may help to achieve these goals.

### Before the Session

- Review the conference Final Program for the exact location, day and time of your session.
- Locate all papers of your session in the conference abstract book/proceedings, and note down the page numbers.
- Learn the amount of time for both invited talks and contributed talks, introduction time, and discussion time. Please adjust these timings based on the total allocated time for your session. Most important is to allow sufficient time for discussion, and is important from the participants' point of view. Please check with your authors who are coming and who will make the presentation to prepare yourself for conducting the session most efficiently.
- Prepare a minute-by-minute total timetable of your session that would then clearly show the starting and ending time for each presentation.
- Obtain information of the authors' education, affiliation, brief work history, important achievements and special awards, etc. for their proper introduction at the session. Only the information about the presenter is important for a multi-authored paper. Reading the title and authors names first at the session acknowledges the other authors.

### At the Session

- Check that all audiovisual equipment needed is in the room, that it is properly positioned and tested. Be prepared to help presenters if any problems arise during the sessions.
- Get familiar with various light switches and projector switches before you start the session.
- Starting and closing of the session at the scheduled time is essential because of our tight schedule. Please be prompt to start the session.
- Introduce yourself.
- Present short introductory remarks on the general subject of the session.
- Inform the audience of the relevant page numbers in the program book.
- Introduce the speaker with brief and interesting remarks before each one starts his/her presentation.
- Keep track of the presentation time. Remind the speakers when their time is going to be finished with warnings at 2 minutes and 1 minute. Please be somewhat flexible and courteous in handling your authors, but don't let any author have an inappropriately large amount of time so that the subsequent authors do not have sufficient time for their presentation.
- Make sure that the speaker uses the microphone so that everyone can hear.
- Ask that participants making comments or asking questions from the floor identify themselves and use a microphone. If there is no microphone, the session chair or speaker should repeat the question/comment so that everyone can hear it.
- Generally, the participants need a stimulus from the session chair to open informal discussions for the free and critical exchange of ideas. Please encourage the audience to take part in the discussions

and to ask questions without any hesitation. Please ensure that only one discussor does not dominate and that opportunity is provided to all discussors within the allowed discussion time.

- If the discussion on any one paper continues longer than anticipated, interrupt and terminate the discussion, as you feel appropriate. Inform the discussors that the discussion can be continued during the coffee break, meals, and other times during the day.
- In case one of the papers is not going to be presented in your session, allow more time to the authors of other papers in your session appropriately.
- At the end of the session, thank the speakers and participants, note the topic and time of the next session, and make any pending announcements.

There is no doubt that the success and efficiency of the session depends on your outstanding conduct. Your cooperation, interest, and efforts are highly appreciated.

## **CANCELLATION OF A CONFERENCE**

In extremely rare circumstances ECI may find it necessary to cancel a conference. This is not a decision made lightly as ECI would incur substantial penalty payments to the hotel. If it is obvious that the conference does not have sufficient registration, and if additional mailings and phone calls to potential participants do not add a sufficient number of registrations, the Director and liaison will decide with the conference chair whether or not to postpone, or possibly cancel the conference. The chair may not make this decision alone.

If the conference topic is very narrow, it may only attract 30-50 participants. When this is so, and when the low attendance is not due to structural problems (conflicts, late program information, etc.), ECI typically elects to run the conference. Many of these small conferences have been extremely successful both from the technical information outcome and attendee satisfaction.

As ECI is hesitant to cancel a conference less than 6 months before the conference date, it is essential that the chair follow the conference timeline established in conjunction with the Director.

In case of a cancellation, ECI will not be responsible for the refund of special airline tickets or other non-refundable transportation commitments that may have been made.

## POST CONFERENCE ACTIVITY

Post conference activity breaks down into several areas:

**QUESTIONNAIRES/EVALUATIONS** – ECI distributes tabulations of the questionnaires/evaluations collected to the chair, co-chairs, liaison, and to the next chair if the conference is a series.

**LIAISON'S REPORT** - A short report is prepared by the liaison, which is sent to the chair and ECI Executive Director and placed on file.

**CHAIR'S REPORT** - The chair is asked to submit a short report for ECI files and is required to complete any reports required by funding agencies. It is also important for any chair who receives funding from any source that requires a summation of or report on the conference to submit the summation/report in a timely manner.

**PROCEEDINGS** - If there is to be a post conference publication, the publisher should be identified as soon as possible if that decision has not yet been made. The editor will work directly with the publisher and ECI will ensure that each participant receives a copy. All orders for copies and financial arrangements are made directly between ECI and the publisher.

**FINANCES** - The processing of travel reimbursements is usually completed within 30 days of receiving the requests. The post conference processing is done on a batch basis once a month. By that time, late payments and requests for travel reimbursements will (hopefully) have been received. If all support items covered by a given grant are complete, funds will be requested from the granting agency. If not, we either wait or send a partial invoice. A report on the recorded use of the Chair's Fund (which includes grants and donations) is available upon request.

Any advances on the Chair's Fund must be accounted for and appropriate receipts attached for auditing purposes.

## NOTES ON THE APPENDICES

A-1 and A-2. PROPOSAL GUIDELINES AND SAMPLE PROPOSALS for both new and series conferences.

B. CONFERENCES SITES This is general information on sites the ECI program uses on a regular basis and should be used as a guide by the conference chair. The ECI staff is available to discuss the sites in more detail.

C: TYPICAL PRELIMINARY ("MARK YOUR CALENDAR") CONFERENCE ANNOUNCEMENT

This is an announcement of the scope and purpose of the conference that is e-mailed (and placed on the web site) to the ECI mailing list for the conference's area of interest and any other publicity sources suggested by the conference chair.

D: TYPICAL GENERAL ANNOUNCEMENTS AND APPLICATION FORM/QUESTIONNAIRE

This announcement contains the basic information about the conference (special areas to be addressed, some of the session topics and, if possible, the names of speakers and session chairs), the site, and, whenever possible, an estimate of the conference fees. The e-mailing is sent to the most appropriate categories of the ECI mailing list and other appropriate mailing lists the organizing committee supplies or suggests.

E: SAMPLE LETTER OF INVITATION

This letter is e-mailed to the list of conference applications (or invitees supplied by the conference chair). The information need for registration is on the conference web site

F: SAMPLE PRELIMINARY VERSION OF THE FINAL PROGRAM

When the preliminary program is received and placed on the conference web site, registration can begin. Historically, ECI has found that people will not register for a conference without a program.

G: REGISTRATION FORMS

Electronic registration forms are to be completed by all the attendees and sent to the ECI office with the complete registration fee.

H: FORM FOR REIMBURSEMENT OF TRAVEL ASSISTANCE FOR A CONFERENCE PARTICIPANT

This form is used by conference participants whom have been authorized travel assistance by the conference chair. A copy must be forwarded to the ECI office. It is essential that original receipts accompany this form if travel reimbursement is 50% or more, as ECI auditors require this.

I: LETTER TO CONFERENCE PARTICIPANT AWARDED FINANCIAL SUPPORT AND/OR TRAVEL ASSISTANCE

This letter is personalized and sent to each participant the chair elects to support. A copy will be forwarded to the chair by ECI.

J: CHAIR'S FUND ASSISTANCE LIST

This form is used to record all conference fees and travel assistance commitments. The chair must send a copy to the ECI office. Letters will be sent to awardees as soon as sufficient funds have been obtained to cover the intended awards.

K: GUIDELINES FOR POSTER SESSIONS

These instructions can be altered as necessary to provide information for conference poster sessions.

L: SPEAKER GUIDELINES

These instructions can be altered as necessary to provide information for speakers.

M: ADDITIONAL THOUGHTS ON CONFERENCE CONTENT

From Herman Bieber

N: CONFERENCE QUESTIONNAIRE

These questionnaires are distributed at each conference. Chairs and co-chairs receive photocopies of completed questionnaires after the conference. In addition, the chair of the next series conference will also receive these questionnaires.

O: SAMPLE LETTERS FOR FOUNDER SOCIETY CO-SPONSORSHIP/COOPERATION

Sample letters for ASME and AIChE

P: SAMPLE LETTER REQUESTING DONTYION FROM INDUSTRIAL DONOR

Q. SAMPLE THANK YOU LETTER TO INDUSTRIAL DONOR

R. SAMPLE SPONSOR BENEFIT LEVELS

## APPENDIX A-1

# CONFERENCE PROPOSAL GUIDELINES

Please use these guidelines when preparing your conference proposal. Include each section listed below, using the underlined words as titles for each section. It is strongly suggested that before you submit a proposal, that you contact the Engineering Conferences International Director who will put you in contact with a member of the Conferences Committee who may serve as the Conference Liaison.

1. Suggested title of conference
2. Preferred dates/location (Note that the final decision is made by EC.I)
3. Name, organization, mail/e-mail addresses, phone/fax numbers of Chair and Co-chair(s)
4. Organizing Committee Membership (name, affiliation, address, e-mail address). At the time the proposal is submitted, this committee should consist of at least five members in addition to the chairs. At least three of these should be committed, not merely "to be invited". If the conference is an international one, there should be committee members from Europe, the Pacific Rim, and North America, as appropriate.
5. Synopsis: This is a short perspective explaining the intended scope and thrust, the major reasons justifying the conference (timeliness, importance, desired accomplishments, etc.)  
  
In this area there should be a paragraph that details that should attend this conference and what they will gain from the conference. This will be used in conference publicity and is particularly important as potential participants can point to this information when asking superiors for permission to attend.
6. Outline of the program as now visualized. (We realize that many of the speakers will be "expected" or "invited", rather than "firm".)
7. Chairperson's prior experience in conference organization.
8. Technical co-sponsorship with professional societies or government agencies. Have or will any of them be approached as a possible technical co-sponsor or cooperating society? (This usually does not mean financial aid, but rather publicity or other aid that broadens awareness of the conference.)
9. Proposal review: Has the proposal for this conference been reviewed by any organization before? If so, which one(s) and what was their response?
10. Other proximate conferences (within approximately 6 months) that might conflict in content or compete for attendance. Please explain.
11. Estimated number of attendees and what percentage will be from industry, government, and academia?
12. External Funding (in addition to the Chair's Fund) to be sought): amounts, sources, chances of success. Could the conference be held if funds were to be denied by one or more of the expected sponsors?
13. Are there proprietary bars to a full exchange of information? If so, please explain.

14. Pre-conference publications - abstracts or proceedings (if any).
15. Post conference publications - extended summary or proceedings (if any).
16. Please include a list of potential speakers with affiliation - even if no commitments have been made. This will be helpful to Conferences Committee members who review the proposal.
17. Publicity suggestions: Publications and societies.
18. Potential participants: A list of approximately one hundred potential participants, preferably with their e-mail addresses. Each member of the organizing committee should contribute to this list.
19. A Mark Your Calendar Announcement: Work with the conference liaison to produce this.

## APPENDIX A-2

### PROPOSAL GUIDELINES FOR CONTINUING CONFERENCE SERIES

Please use these guidelines when proposing the next conference in a series of Engineering Conferences International. Include each section indicated below using the underlined words as titles.

1. Suggested title of conference
2. Preferred dates/location
3. Name, organization, mail/e-mail addresses, phone numbers of Chair and Co-chair(s)
4. Organizing Committee Membership (name, affiliation, address, e-mail address, phone number). At the time the proposal is submitted, this committee should consist of at least five in addition to the chairs. If the conference is an international one, there should be committee members from Europe, the Far East, and North America, as appropriate.
5. Co-sponsorship changes with respect to the preceding conference.
6. Other proximate conferences (within approximately 6 months) that might conflict in content or compete for attendance. Please explain.
7. External Funding to be sought: List all non-ECI sources, amounts and chances of success indicating changes with respect to the previous conference.
8. List all Publications including abstracts, preprints, and post conference publications.
9. Report of the chair of the previous conference.
10. Synopsis: A brief explanation of the intended scope and thrust of the conference. A tentative outline of the program should be supplied, if available.
11. Publicity Suggestions and list of approximately 100 names (and emails) of those likely to attend the conference.
12. Paragraph on Who Should Attend the Conference

## APPENDIX B

### SITES FOR ENGINEERING CONFERENCES INTERNATIONAL

The following is a list of sites which the United Engineering Foundation and Engineering Conferences International either has used for conferences or has inspected and found to be suitable in certain circumstances. Our typical conference site provides a fair degree of isolation yet is reasonably convenient with respect to transportation. Our most cost-effective sites are those we can utilize in off-season or other slow periods. Please contact Director Barbara Hickernell to discuss individual conference needs.

The following locations are among those which have received the most positive feedback:

#### **United States**

**Alaska:** Anchorage. Girdwood (near Anchorage)

**Arizona:** Tucson, Scottsdale

**California:** Monterey area, San Diego, Lake Tahoe, Santa Barbara, Santa Cruz

**Colorado:** Boulder, Colorado Springs, Vail, Denver, Keystone

**Florida:** Destin, Naples, St. Petersburg

**Hawaii:** Kona (Big Island), Kauai, Maui

**Idaho:** Boise

**Maryland:** Rocky Gap

**Massachusetts:** Hyannis, Boston, Cambridge

**Montana:** Big Sky

**New Hampshire:** Waterville Valley

**New Mexico:** Sante Fe (best prices in winter)

**New York:** Upper Hudson Valley, Catskill Mountains

**Utah:** Park City, Salt Lake City, Snowbird

**Vermont:** Burlington

**Virginia:** Lansdowne Resort (Leesburg, near Washington, DC)

**Washington:** Seattle

**Wisconsin:** Lake Geneva

**Canada:** Banff, Lake Louise, Quebec City, Vancouver, Montreal, Whistler, Halifax

**Caribbean:** Dominican Republic, Puerto Rico

**Mexico:** Cancún, Mayan Riviera, Puerto Vallarta, Los Cabos

**Central America:** Costa Rica

**South America:** Brazil, Chile

#### **Europe**

**Austria:** Hernstein, Graz, Innsbruck

Czech Republic: Prague

**Finland:** Porvoo, Naantali

**France:** Deauville, Brittany, Grenoble area

**Germany:** Dresden (Pillnitz), Irsee, Potsdam

**Ireland:** Cork

**Italy:** Barga, Calabria, Orvieto, Sicily

**Netherlands:** Noordwijkerhout

**Poland:** Zakopane, Krakow

**Portugal:** Tomar, Porto, Algarve

**Spain:** Barcelona area, Seville, Bilbao, Lanzarote (CI), Mallorca

**Switzerland:** Davos, Les Diablerts

**UK:** Cambridge, Edinburgh

**Asia and Pacific Rim:**

**Australia:** Fraser Island, Gold Coast

**China:** Beijing, Xi'An, Suzhou

**Hong Kong**

**Korea:** Jeju Island, Gyeongju

**Singapore**

**Taiwan:** Taraka National Park, SunMoon Lake

**APPENDIX C**

**MARK YOUR CALENDAR**

**(See website for samples)**

**APPENDIX D**

**General Announcement  
Call for Papers**

**(See website for samples)**

**APPENDIX E**

## INVITATION LETTER SAMPLE FOR INVITATION-ONLY CONFERENCE

Date

Dear :

On behalf of the Engineering Conferences International and the conference chairs, Dr. **Eleanor Baum** (Copper Union) and Dr. **Carl McHargue** (University of Tennessee), it is my pleasure to extend this invitation for you to participate in the forthcoming conference, **Teaching Entrepreneurship to Engineering Students**. The conference is co-sponsored by **ASEE** and **NCIIA** and will take place at the Doubletree Hotel in Monterey, California from January 12-16.

The preliminary conference program is posted on the conference web site along with:

- 1) Pricing information for the conference
- 2) Registration and payment form
- 3) Pre/Post conference registration form - for reservations at the conference hotel at a discounted rate for three days before or after the conference; send directly to the hotel
- 4) Tourism and transportation information

You and interested colleagues may also register electronically by visiting [www.engconfintl.org/3as.html](http://www.engconfintl.org/3as.html).

We strongly encourage you to register before **December 13** in order to take advantage of the "early bird" rate. After December 13, the normal registration fee applies. **All conference payments must be received by December 31**. No room reservations will be made without prepayment or purchase order.

Discussion and interaction among participants are an important part of ECI conferences and will be emphasized. There will be ample unscheduled time for *ad hoc* discussions among participants.

Please indicate in the designated area if you have special dietary requirements (e.g., vegetarian or specific food allergy). If you have a physical disability and may require accommodation in order to fully participate in the conference, please also indicate this when you register. You will be contacted by ECI to discuss your specific needs.

Casual dress is preferred for ECI conferences. As this conference is being held on the Monterey coast of California, you should bring appropriate clothing for warm, sunny days and a sweater or jacket for the evenings. Check [www.weather.com](http://www.weather.com) for the latest weather in Monterey.

**Speakers: A computer projector and laptop are our standard AV equipment. Thus, you may bring your presentation on a memory stick. You may use your own laptop if you prefer. However, in all cases, please bring a back-up of your presentation. Be sure to leave time in your presentation for discussion.**

Information for those bringing guests: ECI does not have the staff to set up a guest program; however, guests are invited to an informal get-together (time and place to be announced at conference check-in) to meet each other and self-organize activities. The tourist information contained in this packet gives one a good planning device.

Thank you for your continued interest in this program. Please contact Conferences Coordinator Kevin Korpics at our office if you need additional assistance or information. Conference information can be

downloaded from our website (<http://www.engconfintl.org/3as.html>) should you have colleagues who may be interested in this conference.

We look forward to your participation in this conference.

Kindest regards,

Barbara K. Hickernell, CAE  
Executive Director

## **APPENDIX F**

### **SAMPLE PROGRAM FORMAT**

Samples of program can be found on the ECI website both in the active conferences area and in the Past Conferences.

**APPENDIX G**

**REIMBURSEMENT FORM FOR TRAVEL ASSISTANCE OF A CONFERENCE PARTICIPANT**

*Our auditors require that you submit the original receipts with this form. Please keep a copy with your records.*

(Please print or type)

Conference Title:

Committee Meeting Location:

Date:

**EXPENSES:**

Airfare\* or  
Auto Mileage\*\* at prevailing US  
Government reimbursement rate) \_\_\_\_\_

Tolls: \_\_\_\_\_

Local taxi, bus, or limousine: \_\_\_\_\_

Car Rental\*\*\*: \_\_\_\_\_

**TOTAL:** \_\_\_\_\_

**Make check payable to:** \_\_\_\_\_

Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signature: \_\_\_\_\_

\* Only economy class airfare is allowed. The original airline ticket stub must be attached (or a scanned copy emailed).

\*\* Auto mileage is allowed if it doesn't exceed the equivalent round-trip airfare.

\*\*\* Car rental is not allowed unless prior written permission has been obtained from the ECI office.

Please submit your expenses within 30 days of date incurred.

## APPENDIX H

### LETTER AWARDING FINANCIAL SUPPORT TO CONFERENCE PARTICIPANT

Dear

On behalf of the Engineering Conferences International, I am pleased to inform you that you have been awarded the amount of \$\_\_\_\_\_ to help you with your conference fee and/or travel expenses to the ECI Conference \_\_\_\_\_ at the \_\_\_\_\_ Hotel on \_\_\_\_\_ (date) in \_\_\_\_\_ (city).

The amount of this award has been entered in our computer system and will automatically be activated when you register for the conference. (If you have already paid the conference fee, the award will be refunded to you.)

The remainder of the award, if any, may be used for actual travel expenses in accordance with the conditions noted on the enclosed reimbursement form. The form must be completed and returned to us within 30 days after the expenses were incurred.

If the stipend covers more than half of any particular travel expense, ECI is required to have the original travel receipt in order for payment to be made. *Please attach the receipts and a copy of this letter to the reimbursement form.* In all cases, please make a copy of the form and receipts for your files should the originals be lost in the mail.

Normally the process of reimbursement takes between two and four weeks.

We look forward to your participation at this conference.

Kindest regards,

Barbara K. Hickernell, CAE  
Executive Director

**APPENDIX I**

**CHAIR'S FUND – LIST OF ASSISTANCE TO PARTICIPANTS**

Conference Title:

Conference Chair:

Date:

<b>NAME</b>	<b>CONF SPT</b>	<b>TRAVEL SPT</b>	<b>TOTAL SPT</b>	<b>Notes</b>
A Name, Participant	\$1,655.00	\$1,792.29	\$3,447.29	
B Name, Participant	\$1,655.00	\$584.76	\$2,239.76	
C Name, Participant	\$1,655.00	\$500.00	\$2,155.00	
D Name, Participant	\$1,200.00	\$500.00	\$1,200.00	
E Name, Participant	\$1,000.00	\$500.00	\$1,500.00	
F Name, Participant	\$1,000.00	\$500.00	\$1,500.00	
G Name, Participant	\$871.00		\$871.00	
H Name, Participant	\$871.00		\$871.00	
I Name, Participant	\$871.00		\$871.00	
J Name, Participant	\$871.00		\$871.00	
CD rom - temp help	\$500.00			
CR rom - printing	\$200.00			
CD rom - mailing	\$350.00			
Blanket Support	\$10,000.00		\$10,000.00	<b>\$100 per attendee</b>
<b>TOTAL</b>	<b>\$22,699.00</b>	<b>\$4,377.05</b>	<b>\$27,076.05</b>	

<b>SUPPORT MONIES</b>	<b>PLEGDED</b>	<b>RECEIVED BY ECI</b>	<b>DATE RCV</b>
Chair's Fund	5000.00	5000.00	01/01/2010
Contributor!	\$5,000.00	\$5,000.00	01/01/2010
Contributor 2	\$3,000.00	\$3,000.00	01/01/2010
Contributor 3	\$2,800.00	\$2,800.00	01/01/2010
Contributor 4	\$2,700.00	\$2,700.00	01/01/2010
Contributor 5	\$6,000.00	\$6,000.00	01/01/2010
Contributor 6	\$3,802.83	\$3,802.83	01/01/2010
<b>Total</b>	<b>\$28,302.83</b>	<b>\$28,302.83</b>	

This information must be returned to the ECI office at least 6 weeks prior to the conference.

Travel assistance and conference fee waivers will not be approved for persons staying fewer than 3 days at the conference.

## APPENDIX J

### GUIDELINES FOR POSTER SESSIONS AT ECI CONFERENCES

#### GENERAL INFORMATION

In a poster session the author of each paper will be assigned a bulletin board on which he or she may mount diagrams, graphs, data, pictures and a small amount of text to illustrate the main points of the presentation. One of the authors of each paper is expected to remain by the board during the specified poster session in order to present the paper and answer specific questions. The objective of the poster session is to provide authors with sufficient time to present the subject matter in an informal manner, and encourage a two-way exchange of ideas. We hope that this will lead to continued research and development of ideas by the authors and conference attendees and will help in developing personal contacts. The poster session also provides an opportunity to the audience to review many papers - more than would have been possible with paper sessions.

Detailed instructions are provided below for poster presentation. It is imperative that the authors be present by the board during the session. Posters without an attending author are unacceptable.

We hope that the general suggestions presented below will leave you enough freedom for individual and imaginative layout of posters, yet provide the necessary information required for rapid and efficient transfer of information to the audience.

#### BOARD DESCRIPTION AND EQUIPMENT

Each area will be equipped with one 48" x 72" foam core board on an easel with push pins.

Note that the boards will be made of foam core and do not mount your posters on hard boards because they will be difficult to mount on the foam core.

#### POSTER PREPARATION

Posters should be prepared so that they can be easily understood. The content of each poster should be clearly divided into sections including abstract, introduction, problem definition (or aims of the work), summary, results and conclusion. In short, posters should contain all the essential information of your paper but should not be cluttered with unnecessary details. Each figure and table should have a brief title. Overall, your posters should have an easily remembered "take home message." The sizes and number of posters used are left to the discretion of the authors.

Posters can be prepared on ordinary of 8.5" x 11" size paper. Larger sheets may also be used. All lettering and diagrams should be large enough to be read from a minimum of six feet. Hand lettering may be used, but it must be done neatly, using horizontal guidelines, and letters must be at least 1cm high with heavy lines. The posters need not be "arty", but authors are urged to use colors, symbols, and schemes to improve clarity. Shade block letters where possible. **DO NOT ATTEMPT TO PUT TOO MUCH MATERIAL ON A POSTER!**

Suggested lettering size is 3cm for the poster title and 2cm for names and addresses of authors and section headings such as ABSTRACT, INTRODUCTION, RESULTS, DISCUSSION and SUMMARY. Typewritten or computer generated material should be at least 1cm.

As much care should be taken on the preparation of posters as for the preparation of the original figures in the paper or for the preparation of slides for an oral paper. Many of the rules for the preparation of good slides apply to the preparation of good posters (e.g., keep them simple, avoid overcrowding, make sure that letters are large enough to be legible, lines are thick enough to be seen from a distance, and that there is enough contrast between lines or lettering and background, do not try to provide too much information on one sheet, etc.) There is no obligation to fill the entire poster board. Of course colors can be used to enhance the understanding and improve the appearance of your posters. Feel free to use whatever material you wish to convey the necessary information including copies of papers from lab notebooks, strip chart recordings, etc.

It is important not to include too many details in your posters. A poster overloaded with findings will rarely attract attention. One suggestion is to display only short sentences (phrases) under each heading preceded by bullets or numbers to describe the work. Remember, you will be present to provide further information.

### **SUGGESTION TO AUTHORS**

If you can provide something for the participants to carry away (i.e., a one page outlines, bibliography, etc.), your presentation will be remembered longer.

### **MOUNTING AND REMOVAL OF POSTERS**

The authors are to arrive at least one-half hour before the start of the poster session. If you have carefully arranged your posters beforehand, fifteen minutes should be ample time to mount your signs and posters. It is imperative that you plan the layout of posters before you arrive. It is the author's responsibility to remove all the posters and clean their area before they leave the room and within 15 minutes after the scheduled session closing time.

## APPENDIX K

### GUIDELINES FOR SPEAKERS

NOTE: If a speaker needs anything other than a computer projector for his or her presentation, it is necessary that ECI be contacted at least three months before the conference to see what arrangements can be made. Any requirements beyond computer projection may be at the speaker's expense.

The conference or session chair cannot control the presentation skills of speakers; however, speakers should be encouraged to:

1. plan their presentation
  - a. identify their goals
  - b. make the presentation logical
  - c. use examples
2. develop their notes
  - a. don't use a script
  - b. make notes of sufficiently large type that they will be easy to read in poor lighting conditions
  - c. consider using a three ring binder for their notes, background material, visual aids, camera ready copies of handouts
  - d. indicate on notes which slides will be used
  - e. number the pages of the notes
3. prepare slides/overheads  
use large type - 24 point
4. rehearse the presentation
5. plan for questions. A good strategy is to prepare and practice for 75% of the allotted time. This should leave time for questions. Ending late is poor planning.
6. finish on time

It is not appropriate to project whole pages of text from published books or articles. Each slide or view graph must have only one concept, and generally not more than one equation (not counting a few steps leading to same). With today's simple and cheap graphics software, there is no excuse for handwritten or cluttered visuals. The audience deserves readable slides and overheads.

All presentation material is not created equal. When preparing a talk, the speaker should consider the "must know", "should know", and "could know". Limit material based on time or audience interest.

## APPENDIX L

### ADDITIONAL THOUGHTS ON CONFERENCE CONTENT

Contributed by Herman Bieber

Ideally the conference will consist of four well developed threads of interest, one for each day. It works best if the day begins with a keynote speaker of stature to review the state of the art and the challenges ahead. Depending on the audience and the relation of the subject to the main conference theme, it may be necessary to start at an elementary level to bring people "up to speed." The time allotted is normally one hour.

The balance of the morning talks will be technical presentations at the forefront of the field. These can be 30 to 45 minutes, *with one third of this time reserved for discussion*. Twenty minute time slots are to be discouraged, although short summaries may be appropriate for a separate poster session.

In the evening, there are applied presentations, mostly by industry or government users of the technology. Related environmental, political, or economic issues are also appropriate here.

Submitted papers which are of obvious low quality or not relevant to the main themes of the conference should be relegated to poster sessions (if of high enough quality) or rejected. But it should be remembered that in today's economic climate, many organizations will discourage conference travel if there is no presentation made.

In summary, the conference should be a cohesive whole, not merely a smorgasbord of topics submitted at random in response to a "call for papers".

## APPENDIX M

### CONFERENCE EVALUATION FORM/QUESTIONNAIRE

Upon request, Tressa D'Ottavio ([tressa@engconfintl.org](mailto:tressa@engconfintl.org)) will send a sample of the electronic questionnaire/evaluation.

## APPENDIX N

### AIChE SAMPLE LETTER/ASME CONFERENCE APPROVAL QUESTIONNAIRE FOR FOUNDER SOCIETY CO-SPONSORSHIP/COOPERATIVE ARRANGEMENT

#### AIChE

Use your organizational letterhead.

To: AIChE Program Director  
3 Park Avenue  
New York, NY 10016

From: *Your Name*, Chair  
ECI Conference on *Conference Title*

Subject: AIChE Co-sponsorship of above ECI Conference

AIChE co-sponsorship is requested for this conference. It meets the four criteria required, namely:

1. *Subject* is of interest to chemical engineers.
2. There are no known conflicts with AIChE meetings or conferences on this subject close to this proposed conference date of *date*.
3. AIChE is represented by *name* who is co-chair (or organizing committee member). (If there is no member, you can use Herman Bieber who, as liaison, is an *ex officio* member of the conference organizing committee.
4. Engineering Conferences International has sole financial responsibility for this conference. Supplemental funds will be sought for travel expenses, etc. from companies and other organizations.

Please contact me if you have any questions and to confirm AIChE co-sponsorship.

cc: Barbara K. Hickernell, CAE  
Executive Director  
Engineering Conferences International  
32 Broadway, Suite 314  
New York, NY 10004

**TMS SAMPLE FORM/ CONFERENCE APPROVAL QUESTIONNAIRE  
FOR CO-SPONSORSHIP ARRANGEMENT**

**1. Co-Sponsorship in Name Only  
Meeting Submission Request**

Please complete the following form to request a meetings posting on the TMS Global Meetings Calendar. Once the form has been submitted, a TMS staff member will review the information for completeness and will post the meeting on the global meetings calendar within three working days. ( **RED** denotes a required field.)

**MEETING INFORMATION**

**Meeting Name:**

**Meeting Date:**

**Location:**

Meeting Web Site:

General Information E-mail:

Abstract Due Date:

Overview/Description:

Are you requesting TMS co-sponsorship in name only for this meeting?  Yes  No

Would you like a TMS representative to contact you about additional promotion of this meeting to TMS members through print and web advertisements?  Yes  No

**MEETING PROGRAM OUTLINE**

Intended Audience:

Number of Anticipated Attendees:

Technical Program Outline:

**MEETING HISTORY**

If the proposed activity is an update of a previous one on the same or closely related topic, please provide the following information:

Previous Title:

Date/Location:

Primary and Other Sponsors:

Number of Attendees:

Proceedings Title (if published):

Number of Proceedings Sold:

**MEETING SPONSORSHIP INFORMATION**

Primary Sponsor(s):

Secondary Sponsor(s):

**Sponsor Contact:**

**Sponsor E-Mail:**

Sponsor Mailing Address:

City:

State/Province:

Zip/Postal Code:

Country:

Telephone:

Fax:

**MEETING TECHNICAL INTEREST AREA(S)**

It is important that you select all technical interest areas that apply as the meetings will be sorted by these criteria in the calendar.

- Advanced Materials
- Experimental Methods
- Nontechnical Topics
- Advanced Processing
- Extraction and Processing
- Nuclear Materials

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Aluminum                                  | <input type="checkbox"/> Fundamentals                    | <input type="checkbox"/> Other Nonferrous                  |
| <input type="checkbox"/> Aqueous Processing                        | <input type="checkbox"/> High-Temperature Materials      | <input type="checkbox"/> Physical Properties               |
| <input type="checkbox"/> BioMaterials                              | <input type="checkbox"/> Intermetallics                  | <input type="checkbox"/> Polymers                          |
| <input type="checkbox"/> Ceramics                                  | <input type="checkbox"/> Iron and Steel                  | <input type="checkbox"/> Powder Technology                 |
| <input type="checkbox"/> Characterization                          | <input type="checkbox"/> Joining                         | <input type="checkbox"/> Precious Metals                   |
| <input type="checkbox"/> Composites                                | <input type="checkbox"/> Lead, Zinc, and Tin             | <input type="checkbox"/> Process Mineralogy                |
| <input type="checkbox"/> Computer Applications and Process Control | <input type="checkbox"/> Lightweight Materials           | <input type="checkbox"/> Pyrometallurgy                    |
| <input type="checkbox"/> Copper, Nickel, and Cobalt                | <input type="checkbox"/> Magnesium                       | <input type="checkbox"/> Recycling and Secondary Recovery  |
| <input type="checkbox"/> Education                                 | <input type="checkbox"/> Manufacturing and Markets       | <input type="checkbox"/> Shaping and Forming               |
| <input type="checkbox"/> Electrometallurgy                         | <input type="checkbox"/> Mechanical Properties           | <input type="checkbox"/> Superconductivity                 |
| <input type="checkbox"/> Electronic Materials                      | <input type="checkbox"/> Minerals                        | <input type="checkbox"/> Surface Modification and Coatings |
| <input type="checkbox"/> Energy                                    | <input type="checkbox"/> Modeling and Simulation         | <input type="checkbox"/> Synthesis and Processing          |
| <input type="checkbox"/> Environmental Effects                     | <input type="checkbox"/> Molten Metal and Solidification | <input type="checkbox"/> Titanium                          |
| <input type="checkbox"/> Environmental Issues                      | <input type="checkbox"/> Nanotechnology                  |  |

## ORGANIZATION/CONTACT INFORMATION

**Contact:**

**E-Mail:**

Organization:

Mailing Address:

City:

State/Province:

Zip/Postal Code:

Country:

Telephone:

Fax:

## TERMS AND LIMITATIONS

Upon approval by TMS to co-sponsor the proposed event, the co-sponsorship is on a purely nonfinancial basis and will incur no financial obligation, risk, reward or management responsibility.

TMS agrees to post the meeting as a “TMS Co-Sponsored Meeting” on its online Global Meetings Calendar, providing a link to the conference Web site. The meeting will also appear in the *JOM* Meetings Calendar subject to standard editorial constraints.

Within reason, TMS agrees to make available promotional materials for the event at its conferences. Responsibility for producing said promotional conference materials remains with the conference organizers and/or the primary conference sponsor. These materials must be submitted to TMS no later than one month prior to the TMS conference at which the materials will be displayed. These materials should be limited to one-page fliers or small promotional pamphlets.

The conference organizers and their agents shall recognize TMS as a conference sponsor by displaying the TMS logo and/or TMS name on all promotional items and publications, including the conference Web site. The TMS logo cannot be altered.

If additional marketing assistance is desired, the conference organizers or their agents should e-mail [Louise Wallach](#) at TMS.

I have read and accept these terms and limitations

## APPENDIX O

### SAMPLE LETTER REQUESTING DONATION FROM INDUSTRIAL DONOR

[Electronic copy of ECI Letterhead will be provided]

Date

Name

Address

Dear:

We are very excited to announce that the Vaccine Technology VI conference is scheduled for June 12 – 17, 2016, at the Grande Santa Eulalia Resort in Albufeira, Portugal. Building on the strong momentum established at the Vaccine Technology I – V meetings, our goal is to gather together key leaders in the field to discuss progress and technological challenges facing vaccines.

Engineering Conferences International (ECI) is a 501(c)3 non-profit organization renowned in the biotechnology world for sponsoring highly successful topical conferences. These are 100 – 300 attendee meetings that bring together experts in an intimate setting, and differentiate themselves from commercial conferences by providing very high quality, cutting edge scientific content. They provide an outstanding opportunity for exchange of ideas between scientists from diverse backgrounds. We direct you to our website (see the link above) for updates, abstract submission and registration information. We are developing a strong scientific program, the draft of which is attached. Following input from our organizing committee, we have organized keynote talks and technical sessions around current and upcoming major issues in vaccine technology:

- Break through developments in vaccinology
- Issues and case studies in process development
- Formulating and delivering vaccines
- Vaccine characterization/analytics
- Therapeutic vaccines
- Case studies
- New challenges, new technologies in vaccine development.
- One world, one health

Past ECI conferences have been extremely well served by academia, institutions, and industry by participation, attendance, and corporate sponsorship. In order to recognize your interest in this important area of biotechnology, we request your sponsorship in the range of \$1,000 to \$20,000. Funding is essential in order to ensure the high quality talks that are a hallmark of ECI meetings, and to enable attendance of key non-industrial and disadvantaged participants from the developing world and emerging economies. Please note that there is no formal commercial sponsorship of the conference, so your donations are our only source of funding. In this challenging economic climate, your donation is all the more critical to our success. We will acknowledge your institution's sponsorship in all conference materials and with reminders throughout the conference (please see table and payment option in the annexed page). Any contribution at or above \$5,000 will be highlighted as a key contributor. We appreciate your consideration of our request in advance.

Yours sincerely,

## APPENDIX P

### SAMPLE THANK YOU LETTER TO INDUSTRIAL DONOR

December 1, 2009

Dr. Generous Industrial Giver  
Generous Company  
Address  
City, State, Postal Code

Dear Dr. Giver:

On behalf of Engineering Conferences International, I would like to thank Generous Company for its contribution of \$1,000 in support of ECI's conference "**XXX XXIII**" which will be held on (date) in (place).

Engineering Conferences International is the successor program to the United Engineering Foundation Conferences program which was established in 1962 as leading edge interdisciplinary conferences in significant areas of engineering. The more than twelve hundred conferences that have been held since then have been instrumental in generating ideas and disseminating information in greater depth than is possible through most conventional presentations or publications. Contributed funds are used to support the participation in the meeting of investigators who would otherwise be unable to attend and share the results of their research. No overhead is taken on any contribution.

We appreciate Generous Company's willingness to support this important program.

Sincerely,

Barbara K. Hickernell  
Executive Director

c: Conference Chair

## APPENDIX Q

### SAMPLE OF SPONSOR BENEFIT LEVELS



## Vaccine Technology VI

An ECI Conference Series

[www.engconfintl.org/16aa](http://www.engconfintl.org/16aa)

June 12-17, 2016

Grande Real Santa Eulalia Resort  
Albufeira, Portugal

### Sponsor Packages

- **Package A:** **\$1,000**
  - 1/2 page ad in Program
  - Name of Company on Sponsor List in Program
  - Company Logo displayed on screen between sessions
  
- **Package B:** **\$2,500**
  - Full page ad in program
  - Name of Company on Sponsor List in Program
  - Company Logo displayed on screen between sessions
  
- **Package C:** **\$5,000**
  - Full page ad in program
  - Sponsor a Coffee Break including poster display
  - Name of Company on Sponsor List in Program
  - Company logo and link on conference website
  - Company Logo displayed on screen between sessions
  
- **Package D:** **\$7,500**
  - Sponsor a Scientific Session or Workshop including oral introduction
  - Full page ad in program
  - Name of Company on Sponsor List in Program
  - Company logo and link on conference website
  - Company Logo displayed on screen between sessions
  
- **Package E:** **\$10,000**
  - Table of company information (*\*space limited*)
  - Full page ad in program
  - Name of Company on Sponsor List in Program
  - Company logo and link on conference website
  - Company Logo displayed on screen between sessions
  
- **Package F:** **\$20,000**
  - Table of company information (*\*space limited*)
  - Company information packet available in attendees' registration materials
  - Company logo and link on conference website

- Full page ad in program
- Company logo displayed on screen between sessions
- Name of company on sponsor list in program

**Kevin Korpics ([kevin@engconfintl.org](mailto:kevin@engconfintl.org)) (+1-212-514-6760) may be contacted for invoicing and other questions. Please make checks payable to:**

Engineering Conferences International  
Attn: Vaccine Technology VI Conference  
32 Broadway, Suite 314  
New York, NY 10004

**Payment can also be made via wire transfer or credit card.**

**You must reference your company name and the conference title "Vaccine Technology VI" or code (16-AA) so the contribution can be identified. Thank you in advance.**

*Please note that none of the sponsor packages include any free or discounted registrations for attendees from sponsor companies.*