

Memorandum of Understanding V22.0—May 2010 International Conference on Software Engineering (ICSE)

For over thirty years, the *International Conference on Software Engineering (ICSE)* has served as a premier forum for the presentation and exchange of the latest research results and practical experiences in software engineering theories, methods, techniques, tools, and practices. To ensure the continued excellence and success of the ICSE conference series, the parties below enter into this Memorandum of Understanding (MOU). The purpose of the MOU is to define and clarify the roles, authorities, responsibilities, and key practices of the co-sponsors and the organizers of ICSE.

I. Parties

The legal parties to this MOU are:

- Association for Computing Machinery, Inc. (ACM)
- Institute of Electrical and Electronics Engineers (IEEE), incorporated, through its IEEE Computer Society (IEEE-CS). When the conference is in Europe the official contracting party is IEEE International LLC.

The parties to ICSE are:

- ICSE Steering Committee (SC)
- ACM Special Interest Group in Software Engineering (SIGSOFT)
- IEEE-CS Technical Council on Software Engineering (TCSE)
- Association for Computing Machinery, Inc. (ACM)
- Institute of Electrical and Electronics Engineers (IEEE), incorporated, through its IEEE Computer Society (IEEE-CS). When the conference is in Europe the official contracting party is IEEE International LLC.

II. Roles

The roles, authorities, and responsibilities with regard to ICSE are:

- ACM and IEEE-CS are the co-sponsors of the ICSE conference.
- ACM and IEEE-CS serve as Administrative Co-sponsor (AC).
- ACM SIGSOFT and IEEE-CS TCSE represent their respective software engineering societies in the organization of the ICSE conference through their participation in the SC and through their review and approval of the budget for each conference.
- The ICSE SC is responsible for constituting and guiding each edition of the conference within the policies and procedures of the co-sponsors.
- The ICSE SC is responsible for establishing and evaluating practices that are binding upon the organizers of each conference for the continued technical and financial success of ICSE.

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III. Membership of the ICSE SC

- A. The ICSE SC shall be comprised of:
 - Chair of ACM SIGSOFT
 - Chair of IEEE-CS TCSE
 - The three most recent past ACM SIGSOFT and IEEE-CS TCSE Chairs
 - All General and Program Chairs or Co-Chairs, who have been approved by the ICSE SC for future conferences
 - All General and Program Chairs or Co-Chairs of the preceding three conferences
- B. Representation shall reflect the goal of providing continuity, expertise, and organizational memory for ICSE planning and oversight. It shall also provide equal representation of the co-sponsors ACM and IEEE-CS and their respective software engineering societies ACM SIGSOFT and IEEE-CS TCSE.
- C. The Chair of the ICSE SC shall be elected from among the SC members for a term of two years.

IV. Legal and Financial Sponsorship

- A. ACM and IEEE-CS shall be the co-sponsors of the conference. The legal and financial liability for ICSE is split evenly between the co-sponsors, fifty (50) percent for ACM and fifty (50) percent for IEEE-CS.
- B. Subject to the recommendation by a conference's General Chair and approval by the ICSE SC, ACM and IEEE-CS, Local Co-Sponsors (LCS) may assume up to fifty (50) percent of the legal and financial liability for a particular conference, with ACM and IEEE-CS splitting the remaining percentage evenly. The LCS will share in both surplus/loss unless otherwise agreed to by ACM and IEEE-CS. If there is more than one local society that will share in the partnership, a lead society must be identified to coordinate contributions and financial matters for the LCSs. Any participation of an LCS in the financial sponsorship of a conference must be approved normally at least two years before the conference.
- D. Any surplus or loss from the operation of an ICSE conference, as reported in the approved final financial report for the conference will be pro-rated between the co-sponsors according to their percentage of sponsorship.

V. Intellectual Property

- A. Ownership of the Conference Name and Acronym
ACM and IEEE-CS are the joint owners of the rights and titles throughout the world to the ICSE conference. Current ICSE marks are specified in the ICSE Guidelines, Part B.
- B. Use of the Conference Name and Acronym
The acronym and name of the conference may be used in publicity materials for an ICSE conference and in materials and products produced by the conference. The acronym and name of the conference may not be used for any other conference.
- C. The copyright for all materials newly developed under this MOU, including, but not limited to, ICSE conference and workshop proceedings, post-event products, all event byproducts, and any other intellectual property produced by an ICSE conference—in any form and in any media ("Newly Developed Materials"), will be held by and alternated between ACM and IEEE-CS. Normally, the copyright holder will be the AC. Ownership of all Newly Developed

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Materials may be wholly owned by either of the Sponsoring Parties. ACM and IEEE-CS grant to each other a perpetual, non-exclusive, worldwide, royalty-free license to use, reproduce, make derivative works from, display, distribute and perform all Newly Developed Materials in any form and in any medium, including, but not limited to, publication of Newly Developed Materials in printed and online publications, and other media, including but not limited to CDs and DVDs. No co-sponsor may transfer or assign any share of the copyright rights without the written consent of the other co-sponsor.

- D. The ICSE proceedings and workshop proceedings and any other conference publications and materials, including web sites, calls for papers, proposals and participation, advance and final programs, and any other advertising and publicity materials, shall prominently carry the names and/or logos of ACM, IEEE-CS, ACM SIGSOFT, IEEE-CS TCSE, and those of any additional approved financial co-sponsors. The logos of the co-sponsors and the societies shall be featured equally so as not to suggest any priority or preemption as between the co-sponsors and the societies. Each co-sponsor grants a non-exclusive, royalty-free, worldwide license to the other co-sponsor to use its name and logo in connection with the advertising and promotion of ICSE.
- E. Both ACM and IEEE-CS must include the proceedings of the conference including workshop proceedings in their respective digital libraries each year (cf. Article V-C above). The General Chair must notify the publisher of the proceedings that the publisher is required to forward the intellectual property in electronic format to both ACM and IEEE-CS as early as possible, and in no case later than two weeks after the conference is concluded to ensure timely posting into the digital libraries.
- F. Both ACM and IEEE-CS reserve the right to purchase hard copy and/or electronic media of all conference products including the ICSE proceedings and the ICSE workshop proceedings at the same cost as charged to the conference.

VI. Conference Administration

ACM and IEEE-CS alternate as the AC, with ACM responsible when the conference is in North America and IEEE-CS when the conference is in Europe, and alternating when the conference is in other continents. Should the SC wish to deviate from this routine, the co-sponsors will consider requests and be flexible if possible.

VII. Responsibilities and Authorities

- A. The ICSE SC is responsible for general oversight of the conference, including guiding the scope of the conference, choosing conference leaders (including General Chair and Program Co-Chairs), selection of conference locations, proposing any change in the AC rotation, and providing financial and operational guidance conforming to the policies and procedures of the co-sponsors. Specific operational expectations and procedures for an ICSE conference are contained in "Guidelines for Organizing the International Conference on Software Engineering," a document maintained by the ICSE SC in consultation with all the other parties of this MOU. Specific responsibilities of the ICSE SC are enumerated in ICSE Guidelines Part A.
- B. The AC will hold primary administrative responsibility for an ICSE conference. Specific responsibilities of the AC are enumerated in ICSE Guidelines Part B.

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- C. ACM SIGSOFT and IEEE-CS TCSE are responsible for the review and approval of all conference budgets, promoting and publicizing the conference, scheduling and coordinating calendars to prevent overlap of the ICSE conference with other conferences in software engineering, and using surplus funds generated by ICSE for the betterment of software engineering as a discipline. Specific responsibilities of the ACM SIGSOFT and IEEE-CS TCSE are enumerated in ICSE Guidelines Part C.
- D. The General Chair and the rest of the conference committee are responsible for complying with the guidelines for conference operations set forth by the AC and the ICSE SC. Specific responsibilities of the General Chair are enumerated in ICSE Guidelines Part D.
- E. When an LCS is a co-sponsor of an ICSE conference, the specific responsibilities and authorities of the LCS must be put in writing and ratified by the SC, ACM, and IEEE-CS, in consultation with the conference's General Chair. LCS ratification must normally occur at least two years before the conference.

VIII. Budgets and Financial Reporting

- A. The General Chair of an ICSE conference shall use a single Technical Meeting Request Form (TMRF) in budgeting for the conference. The General Chair shall look first to use the IEEE-CS TMRF to provide consistency of budget information among instantiations of the conference, and in order to support consistency in ICSE conference budgeting and ease of reference. Use of the ACM TMRF is also permitted. Both societies shall approve an ICSE conference budget, on a single timeline, to allow a single notification of budget approval through the AC to the General Chair.
- B. Administrative and overhead fees required by the co-sponsors shall be included in the budgeting process. Any operating surplus shall be returned to the co-sponsors (cf. Article IV-C above).
- C. The AC and the conference leaders will work diligently to present a final financial report on the conference no later than four (4) months after an ICSE conference. This report shall be approved by the General Chair of the conference and by ACM and IEEE-CS. The co-sponsors will receive their share of the surplus funds or will cover their share of a loss not later than thirty (30) days after the submission of the final financial report.
- D. The ICSE SC expenses and contracted services to support conference continuity and success shall be funded via an expense line item in each ICSE's TMRF. The amount shall be approved by the ICSE SC, ACM and IEEE-CS each year. Any expenditure of the ICSE SC funds shall be explicitly approved by the Chair of the ICSE SC.

IX. Indemnity

Each co-sponsor shall indemnify and hold harmless the other co-sponsor(s) from and against any and all claims, demands, liabilities, settlements, damages, costs, and expenses, including reasonable attorneys' fees and expenses, arising out of, or in any way connected with, any default, breach or negligent non-performance of this MOU or any willful or negligent act or omission on the part of itself, its agents and employees arising out of this MOU.

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X. Non Discrimination

IEEE is committed to the principle that all persons shall have equal access to programs, facilities, services, and employment without regard to personal characteristics not related to ability, performance, or qualifications as determined by IEEE policy and/or applicable laws.

IEEE prohibits discrimination, harassment or bullying against any person because of age, ancestry, color, disability or handicap, national origin, race, religion, gender, sexual or affectional orientation, gender identity, appearance, matriculation, political affiliation, marital status, veteran status or any other characteristic protected by law. IEEE expects that its suppliers shall maintain an environment free of discrimination, including harassment, bullying, or retaliation when and where ever those individuals are conducting IEEE business or participating in IEEE events or activities.

XI. Proprietary or Confidential Information

“Confidential Information” as used herein means information identified by either party as “Confidential” and/or “Proprietary,” or information that, under the circumstances, ought to be treated as confidential and/or proprietary. Neither party shall disclose to a third party Confidential Information of the other party. The receiving party shall use the same degree of care as it uses to protect its own confidential information of like nature, but no less than a reasonable degree of care, to maintain in confidence the Confidential Information of the disclosing party. Each party further agrees to act as trustee for any Confidential Information jointly created or acquired through the parties’ participation in this MOU.

XII. Dissolving the Relationship

Either ACM or IEEE-CS may elect to withdraw as a co-sponsor after giving notice in writing no later than eight (8) months prior to the next ICSE conference date. If this occurs, the remaining party/parties may assume all responsibility for the management of the conference series. In return for accepting this responsibility, the remaining party/parties will receive all net surplus, but the initial co-sponsors would equally share any net loss for only the next instance of the ICSE conference. In addition, the departing party will make all reasonable efforts to transfer all conference related materials or property under its control to the remaining association.

XIII. Miscellaneous

- A. Binding Effect. This MOU shall inure to the benefit of, and be binding upon the Sponsoring Parties, their successors in interest, legal representatives, and assigns.
- B. Assignment. None of the Sponsoring Parties may assign or transfer its interest in this MOU, nor any interest herein or claim hereunder without the express written consent of the other Sponsoring Party.
- C. Waiver. Any waiver of a breach of any provision of this MOU shall not operate or be construed as a waiver of any subsequent breach.
- D. Governing Law. This MOU shall be interpreted under and governed by the laws of the State of New York, without reference to its conflicts of laws principles.
- E. Dispute Resolution. Any controversy or claim arising out of or relating to this MOU shall be settled by arbitration in accordance with the rules of the American Arbitration Association.

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Such arbitration shall occur in New York City and be conducted by one arbitrator, jointly chosen by the Sponsoring Parties. Any such decision of the arbitrator shall be binding upon the parties.

- F. Severability. If any provision or provisions of this MOU shall be held to be invalid, illegal, unenforceable or in conflict with the law of any jurisdiction, the validity, legality and enforceability of the remaining provisions shall not in any way be affected or impaired thereby.
- G. Precedence of MOU. In case of any conflict between this MOU and any ICSE Guidelines provisions, this MOU shall have precedence.

XIV. Date in Force

This agreement shall govern all ICSE conferences commencing with the date of the final signature of this MOU and replace all previously signed ICSE MOUs.

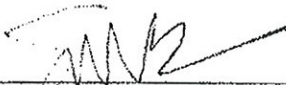
XV. Duration of this MOU

The intended period for this MOU is five (5) years from the date of signing. ACM, IEEE-CS, ACM SIGSOFT, IEEE-CS TCSE, and ICSE SC shall conduct a review of this MOU during the fourth year from the date of signing and may also request a review of this MOU at any time. The current MOU shall remain in effect until a new MOU is adopted by ACM, IEEE-CS, ACM SIGSOFT, IEEE-CS TCSE, and ICSE SC.

ICSE Memorandum of Understanding

Accepted by:

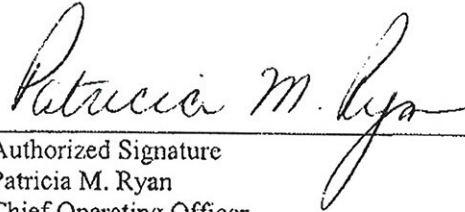
The Institute of Electrical and Electronic Engineers, Incorporated, through its IEEE Computer Society



Authorized Signature
Evan Butterfield
Director, Products and Services

Date:

Association for Computing Machinery, Inc.

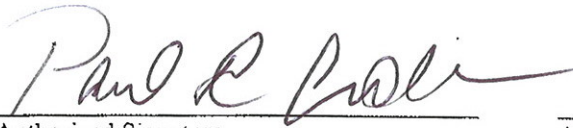


Authorized Signature
Patricia M. Ryan
Chief Operating Officer

Date: 11-8-10

Endorsed by:

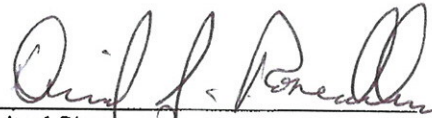
IEEE Technical Council on Software Engineering (IEEE-TCSE)



Authorized Signature
Paul R. Croll
Chair

Date: 9/11/2010

ACM Special Interest Group on Software Engineering (ACM SIGSOFT)



Authorized Signature
David Rosenblum
Chair

Date: 09/11/2010

Steering Committee of the International Conference on Software Engineering



Authorized Signature
Wilhelm Schäfer
Chair

Date: 09/11/2010

ICSE Guidelines

Part A

Responsibilities of the ICSE Steering Committee (SC)

I. ICSE Steering Committee Meeting

- The Chair of the ICSE SC is responsible for setting up semi-annual ICSE Steering Committee meetings—one of the meetings shall be held during the ICSE conference week and the other approximately six months later.

II. ICSE Practices

- The ICSE SC is responsible for establishing and evaluating practices that are binding upon the organizers of each conference for the continued technical and financial success of ICSE.

III. Constituting an ICSE Conference

The ICSE SC is responsible for:

- Constituting each edition of the ICSE conference.
- Recruiting and identifying the tatee (i.e., a person, who proposes potential conference leaders and potential venues for a future ICSE conference) for an ICSE conference at least four years in advance.
- Approving conference locations. The conference location rotates every three years between North America, Europe, and the rest of the world.
- Proposing any change in the conference location rotation.
- Proposing any change in the AC rotation.
- Ratifying a Local Co-Sponsor (LCS) for an ICSE conference in accordance with the principles given in the MOU.
- Approving the following conference leaders:
 - General Chair or General Co-Chairs
 - Program Co-Chairs
 - Workshops Co-Chairs
 - Tutorials Co-Chairs

IV. Oversight of an ICSE Conference

- The ICSE SC is responsible for overseeing and guiding the scope, technical success, financial success, and operational success of an ICSE conference.
- The ICSE SC is responsible for ensuring that the selected ICSE conference chairs receive a copy of the ICSE Memorandum of Understanding (MOU) and Guidelines and that they agree explicitly to act in accordance with the terms of those documents.

V. ICSE Steering Committee Budget

- The ICSE SC is responsible for its own budget.
- The ICSE SC budget is used to pay for the committee's expenses, including any contracted services to support conference continuity and success.
- Funding for the ICSE SC budget shall be obtained via an expense line item in each ICSE's TMRF.
- The annual expense line item amount shall be justified by a statement of proposed expenses and is subject to approval by ACM and IEEE-CS.

ICSE Guidelines

Part B

Responsibilities and Services of the Administrative Co-Sponsor

I. Administrative Co-Sponsor

- ACM and IEEE-CS alternate as Administrative Co-sponsor (AC) for the ICSE conference.

II. Administrative Co-Sponsor Liaisons

- Both ACM and IEEE-CS will designate a staff person as liaison to the ICSE conference.
- The staff liaison or function for the AC will be the co-sponsors' primary liaison for the year. Staff liaisons will facilitate providing organizers access to additional staff, who are knowledgeable in different areas of conference management.

III. Approval of Local Co-Sponsors

- A Local Co-Sponsors (LCS) may be selected and approved in accordance with the principles given in the MOU (Section IV(B)).

IV. Budget and Financial Reporting

- Budgeting and financial accounting shall proceed in accordance with the principles given in the MOU (Section VIII).
- The AC is responsible for the approval of the conference budget, according to the principles given in the MOU. More specifically, the AC is responsible for:
 - Receiving budget, and forwarding copy to co-sponsor(s) for comment and approval
 - Gathering comments on budget and working with conference leaders to clarify and resolve problems
 - Submitting revised budget for approval by co-sponsors (on reasonable timeline)
 - Receiving budget approval from sponsoring societies and notifying conference leadership and Chairs of SIGSOFT, TCSE, and any other sponsoring agency of the conference approval
- ACM and IEEE-CS shall maintain an archive of budget documents of previous ICSE conferences (i.e., approved budgets and final financial reports). The documents shall be maintained in the format of the agreed Technical Meeting Request Form (TMRF) to provide consistency of budget information among instantiations of ICSE and for ease of reference.

ICSE Guidelines

V. Copyright

- The copyright for all ICSE proceedings, including workshop proceedings, and any other intellectual property produced by an ICSE conference, will be held and managed in accordance with the principles given in the MOU (Section V).

VI. Contracts

- The AC is responsible for negotiating and executing the hotel contract.
- The AC is responsible for issuing RFPs and approving all major contracts, including but not limited to hotel, conference management, registration management, publisher management, website support, audio/visual management, food and beverage, and contracts. AC will review/negotiate and execute contracts with the GC approval making sure that contracts comply with AC contract guidelines.

VII. ICSE Trademarks

- ACM is responsible for guarding and defending the ICSE trademarks. IEEE agrees to cooperate with ACM in obtaining registration of the Conference Marks and to execute any documents and take any actions that may be necessary to enable ACM to secure registration of and enforce rights in the Conference Marks.
- The Service Mark, "INTERNATIONAL CONFERENCE ON SOFTWARE ENGINEERING" is the property of ACM—Registration number 1246626, Registration Date: July 26, 1983, United States Patent and Trademark Office. The Service Mark, "ICSE" is the property of ACM—Registration number 3508250, Registration date July 15, 2008, United States Patent and Trademark Office. IEEE shall have a non-exclusive, non-transferable, royalty-free license to use the ICSE Conference Marks in connection with ICSE. IEEE agrees to cooperate with ACM in obtaining registration of the ICSE Conference Marks and to execute any documents and take any actions that may be necessary to enable ACM to secure registration of and enforce rights in the ICSE Conference Marks. The European trade mark will be added here when it becomes available.
- ACM and IEEE-CS agree to share the costs of establishing, guarding and defending the marks.

VIII. Co-Sponsor Benefits

- ACM and IEEE provide name recognition, brand name, quality seal, industry standard
- Conference registration discounts to ACM and IEEE-CS members
- Indemnity for conference organizers
- Legal liability and legal representation
- Each Sponsoring Party represents and warrants that they maintain general liability insurance in an amount no less than \$1 Million to cover potential liabilities that could arise from the Sponsoring Parties participation in the Conference
- Financial liability (proportionate to the percentage of sponsorship)
- Financial risk management

IX. Co-Sponsor Services

- Access to ACM and IEEE-CS personnel, experience and technology
 - Advice on all aspects of conference organization through experienced personnel
 - Budget development and approval support
 - Liaison to steering committee
 - Liaison to General Chair
- Maintenance of corporate knowledge
 - Budgets history
 - Attendance history
 - Conference space requirements history
 - Hotel room requirements history
 - Corporate knowledge including other conferences
 - Hosting archival ICSE website (ACM)
 - Corporate knowledge archiving
 - Maintain legacy publications
- Publicity services
 - ACM and IEEE-CS calendars
 - Promotion and marketing strategies; IEEE-CS marketing team
 - Production, printing, distribution of promotional materials
 - Trademark/logo/web domain names enforcement
 - Hosting of websites and e-mail distribution lists
- Contract services
 - RFP preparation, solicitation and screening
 - Hotel contract negotiations including standardized agreements with preferred hotel chains
 - Visit conference venue with General Chair if needed
 - Relationships with hotel chains
 - Hotel chain representatives
 - Monitoring hotel pick up and working with hotel
 - Other vendor contract negotiations (e.g., registration, conference management, A/V, food and beverage)
 - Issues arising regarding contracted deliverables (e.g., scope of service is not met or delivered)
- Publication services
 - Author templates
 - Copyright forms
 - PDF Express free of charge
 - Digital libraries (preparation, indexing, hosting, publicity)
 - Priority indexing service
 - Ownership for Intellectual Property (IP)
 - IP issues (short- and long-term)
 - Copyright infringement and patent dispute cases (short-term and long-term)
 - Receipt and management of manuscripts

ICSE Guidelines

- Production and printing of products
- Financial services
 - Banking services (in-house and/or outside)
 - Banking MOUs with universities
 - Oversee setting up clear responsibilities for authorization of payments
 - Accounting services
 - Invoicing
 - Credit card processing
 - Advance loans
 - Collect 1099 information from conference organizers, and issue 1099s as required
 - Tax-exempt status and coverage
 - VAT filing services
 - Disbursements
 - Invoicing for donations (in part)
 - File music licensing forms and payments as needed
 - Conference closing and account reconciliation support
 - Discounted conference audit services
- Visa letters (in part)

X. Co-Sponsor Conference Organization Resources

ICSE Conference Organization and History

- <http://www.icse-conferences.org/>
- <http://www.icse-conferences.org/organization.html>

ACM Conference Organization Manual

- <http://www.sigplan.org/guidelinesforthechair.htm>
- http://www.acm.org/sigs/volunteer_resources/conference_manual/conference_manual-toc

IEEE Conference Organization Manual

- <http://www.sigplan.org/guidelinesforthechair.htm>
- http://www.ieee.org/web/conferences/mom/mom_sect4.html
 - http://www.ieee.org/web/conferences/organizers/required_documentation.html

ICSE Guidelines

Part C

Responsibilities and Services of ACM SIGSOFT and IEEE-CS TCSE

I. ICSE Steering Committee Meeting Attendance

The ACM SIGSOFT and IEEE-CS TCSE Steering Committee members are expected to attend—in person or in exceptional circumstances by teleconference—the semi-annual ICSE Steering Committee meetings.

- Chair of ACM SIGSOFT
- Chair of IEEE-CS TCSE
- The three most recent past ACM SIGSOFT Chairs
- The three most recent past IEEE-CS TCSE Chairs
- The current Vice Chair and the three most recent past Vice Chairs of ACM SIGSOFT (starting with the current and the most recent) can serve as alternates for any of the four ACM SIGSOFT Steering Committee members
- The current Vice Chair and the three most recent past Vice Chairs of IEEE-CS TCSE (starting with the current and most recent) can serve as alternates for any of the four IEEE-CS TCSE Steering Committee members
- Administrative Co-Sponsor Liaisons

II. Administrative Co-Sponsor Liaisons

- Both ACM SIGSOFT and IEEE-CS TCSE will designate a member of their executive committee as liaison to the ICSE conference.

III. Community Coordination and Investment

- ACM SIGSOFT and IEEE-CS TCSE are expected to act on behalf of the general software engineering community to provide a voice on behalf of the members of their communities to the deliberations of the ICSE SC.
- In addition to ICSE, ACM SIGSOFT and IEEE-CS TCSE each sponsor a large number of regularly scheduled events. ACM SIGSOFT and IEEE-CS TCSE are responsible for providing coordinated scheduling for these events so that they do not conflict with ICSE. In particular, ACM SIGSOFT and IEEE-CS TCSE are responsible for making best efforts not to schedule any ACM SIGSOFT and IEEE-CS TCSE-sponsored events from being held within one week prior to or following the full week of ICSE including its collocated events and workshops.

ICSE Guidelines

- Surpluses generated by the ICSE conference series, which are returned to ACM SIGSOFT and IEEE-CS TCSE should be invested by ACM SIGSOFT and IEEE-CS TCSE directly into their software engineering communities through a variety of vehicles, such as travel subsidies for students and other needy groups, achievement and recognition awards, and subsidizing new events.

IV. Publication of Logos

- ACM SIGSOFT and IEEE-CS TCSE are responsible for monitoring ICSE products and materials so that they bear the names and logos of ACM, IEEE-CS, ACM SIGSOFT, IEEE-CS TCSE, and those of any additional approved financial co-sponsors (if any) and that the logos of the co-sponsors and the societies shall be featured equally. Products include the ICSE proceedings and ICSE workshop proceedings and any other ICSE publications; materials include web sites, calls for papers, proposals and participation, advance and final programs, and any other publicity materials.

V. Digital Libraries

- ACM SIGSOFT and IEEE-CS TCSE are responsible for monitoring their respective digital libraries to ensure that the ICSE proceedings and ICSE workshop proceedings appear immediately following ICSE each year. In particular, ACM SIGSOFT and IEEE-CS TCSE are responsible for ensuring that the ICSE proceedings appear roughly at the same time in these digital libraries.

VI. Publicity

- ACM SIGSOFT and IEEE-CS TCSE are responsible for providing advertising of ICSE through their mailing lists, websites, and publications.
- Provide mailing lists of ACM SIGSOFT and IEEE-CS TCSE to the General Chair.

ICSE Guidelines Part D

Responsibilities of ICSE Conference General Chair

I. Accountability and Reporting

- The General Chair of an ICSE reports to the ICSE Steering Committee Chair and to the Administrative Co-sponsor (AC) (i.e., designate of ACM or IEEE-CS).
- Upon request by the ICSE CS or ACM or ACM SIGSOFT or IEEE-CS TCSE, and at reasonable intervals, the General Chair is to provide a detailed update on current conference activity, including, but not limited to, current financial and registration activity.

II. Duration of Appointment

- The term of appointment for an ICSE General Chair is 48 months (3 years before an ICSE conference and one year after an ICSE conference).

III. Responsibilities and Obligations

- To plan and execute an ICSE conference so that it is a technical and financial success.
- To oversee the activities of all conference sub-committee chairs and co-chairs.
- To ensure that the conference objectives as established by the ICSE Steering Committee (SC) are met.
- To ensure that the conference objectives of the societies and co-sponsors are met.
- To serve as a focal point for communications between the conference committee and the staff of the AC.

IV. Selection Criteria for General Chairs

- Must be a member of ACM or IEEE.
- Must be of sufficient stature within the ICSE software engineering community.
- Must be a competent manager, preferably with significant management and budgeting experience.
- Must have outstanding communications skills.
- Must have support from employer since chairing an ICSE conference is a major commitment requiring significant time and energy over a four-year period.
- Is advised against committing to other major volunteer activities since the success of the conference depends on the ongoing and regular management of the conference committee.

V. Conference Organization Resources

The General Chair must be familiar with the following conference organization resources.

ICSE Conference Organization and History

- <http://www.icse-conferences.org/>
- <http://www.icse-conferences.org/organization.html>

ACM Conference Organization Manual

- <http://www.sigplan.org/guidelinesforthechair.htm>
- http://www.acm.org/sigs/volunteer_resources/conference_manual/conference_manual-toc

IEEE Conference Organization Manual

- <http://www.sigplan.org/guidelinesforthechair.htm>
- http://www.ieee.org/web/conferences/mom/mom_sect4.html
- http://www.ieee.org/web/conferences/organizers/required_documentation.html

VI. Major Responsibilities

A. Conference Venue

In consultation with ACM and IEEE-CS staff, select conference city and hotel. Seek approval of conference site from ICSE SC. Let ACM and IEEE-CS staff negotiate hotel contract (do not negotiate contract yourself).

B. Progress Reports

For the entire duration of the appointment, present semi-annual progress reports in person to the ICSE SC.

C. Master Plan and Risk Analysis

Develop a master plan and perform risk analysis for the entire conference, including financial and technical risks, responsibilities, timelines, milestones, deadlines, and check lists for the entire conference for all sub-committee chairs and co-chairs.

D. Preliminary Approval Form (PAF)

This form allows conference organizers to secure dates on the ACM and IEEE-CS conference calendars and obtain agreement in principle from all sponsors (ACM, IEEE-CS and other co-sponsors) that the conference will occur. Note that this form does not grant rights to conference organizers to enter into contracts, to incur expenses, to advertise conference registration rates, to open a bank account, or to collect funds for the conference.

E. Learning Opportunities

- It is highly recommended that General Chairs of a future ICSE attend every postmortem session of prior ICSE conferences to gain experience with ICSE conference organization.
- The ICSE SC—with its many past General Chairs and Program Co-Chairs—is a rich source of information for how to organize and execute an ICSE conference. General Chairs are strongly encouraged to solicit feedback from SC Chair and selected SC members on all aspects of ICSE conference organization and execution.

ICSE Guidelines

- It is also suggested to take advantage of other learning opportunities be provided, such as “shadowing” another General Chair or being involved or at least being copied in important conference organization discussions.

F. Technical Meeting Request Forms (TMRF)

- Work with Treasurer to prepare the ICSE budget using the IEEE-CS Technical Meeting Request Form (TMRF). Review and approve all items that exceed approved budgeted expenses. The General Chair is ultimately responsible for the revenue and expenses of the conference. It is important to review and understand the requirements of the Administrative Co-sponsor (AC) (e.g., administrative fees).
- The overall purpose of the TMRF is to collect the information that is necessary to evaluate the proposed conference for approval. The TMRF is an important planning document to help plan the finances of the conference and identify decisions which must be made in the planning process. Consistently using the IEEE-CS TMRF will provide readily comparable information for future conference leaders.

G. Financial Management

- Each ICSE conference is expected to generate a surplus.
- In consultation with Treasurer and AC, decide on financial management for the conference
- Central versus distributed banking and accounting (e.g., central account at AC in USD as well as local university in local currency)
- Invoicing of donations (i.e., by AC in USD or local university in local currency)
- Contracts (i.e., paid by AC in USD or local university in local currency (e.g., using donations in local currency)
- Registration (i.e., in USD and/or local currency)
- For conferences outside US/North America:
 - Working with AC to identify potential local co-sponsoring organizations.
 - If a local co-sponsor is added, ensure that a Joint Sponsorship Agreement or Memorandum of Understanding is developed and signed that covers percentages of conference sponsorship and other financial, legal, and copyright issues.

H. Conference Committee Chairs or Co-Chairs

Recruit and appoint sub-committee co-chairs for the technical and administrative positions of the conference as outlined below. Other leadership positions are appointed at the discretion of the General Chair. Inform and oversee all these subcommittee chairs of their duties and responsibilities. Be sure that each chair understands budgetary allocations, task deadlines, and the ICSE conference policies of the SC and the AC.

- Identify and recruit chairs for several conference sub-committees dealing with different aspects of the technical success of an ICSE program:
 - Program Co-Chairs (must be approved by ICSE SC; required by ACM)
 - Workshop Co-Chairs (must be approved by ICSE SC)
 - Tutorial Co-Chairs (must be approved by ICSE SC)
 - Collocated Events
 - Industrial Track

ICSE Guidelines

- Education Track
- Research Demo Track
- New Faculty Symposium
- Frontiers of Software Engineering
- Software Practice or Industry Track
- New and Emerging Results Track
- Doctoral Symposium
- New Faculty Symposium
- Identify and recruit chairs for several conference sub-committees dealing with different aspects of the financial and organizational success of an ICSE conference:
 - Web Master
 - Publications Co-Chairs
 - Treasurer or Finance Chair (required by ACM)
 - Fund-raising and Sponsorship Co-Chairs
 - Promotions and Publicity Co-Chairs
 - Registration Chair
 - Local Arrangements Co-Chairs
 - Student Volunteers Co-Chairs
 - Student Contests and Mentoring Co-Chairs
- Establish discretionary policies (i.e., policies not outlined by AC) governing conference activities working with treasurer (e.g., expense reimbursement guidelines and payment approval guidelines), web master (e.g., major and minor updates and schedule), registration chairs (e.g., complementary registration for keynotes and program co-chairs)
- The General Chair must notify the publisher of the proceedings that the publisher is required to forward the intellectual property in electronic format to both ACM and IEEE-CS within two weeks following the conference. During the preliminary preparation for the each instance of the conference, the General Chair must ensure the necessary forms required by either the IEEE or ACM policies are completed to insure the subsequent timely posting of the publications materials into the digital libraries as quickly as possible after the conference.
- In consultation with program co-chairs, invite keynote speakers

I. Communication Channels

- Establish effective communication with AC.
- Establish effective communication channels with key conference committee members through web site, mailing lists, regular conference calls, progress reporting and tracking.
- Schedule program and conference committee meetings.
- Define publicity strategy, timeline, and milestones, including web site, calendars, calls, ads, registration, mailings, poster, postcard, advance programs, and logistics.
- Prepare progress reports and agendas for conference committee meetings and distribute minutes of meetings to members of the Conference Committee, SC Chair, and AC.

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J. Execution of ICSE Conference Contracts

Work with the AC on issuing RFPs to conference vendors and evaluating proposals. All major contracts must be endorsed by General Chair and approved by AC, including hotel, conference management, registration management, publisher or publications management, audio/visual management, food and beverage. AC will review/negotiate and execute contracts making sure that contracts comply with contract guidelines. Consult extensively with AC on all contracts.

K. Conference Management

- Logistical management
- Conference week schedule
- Room assignments including ancillary meetings, including ACM SIGSOFT, IEEE-CS TCSE town hall meetings, ICSE+1/+2 Conference Committee, ICSE+1 Program Committee, IEEE TSE, ACM TOSEM, FSE PC
- Display of sponsor logos
- Signage
- Wireless Internet access
- Conference and sponsors banners
- Conference bags
- AV schedule
- Catering schedule
- Exhibits schedule (if any)
- Final program
- Hotel room block management
- Free hotel rooms for VIPs management

L. Conference Week

- Establish an evaluation mechanism for all aspects of the conference.
- Chair opening and closing sessions of the conference.
- Chair awards session.
- Chair victory dinner.
- Endorse tutorial payments.
- Conduct a postmortem session at the end of the conference (usually Saturday morning) for future conference organizers.
- Ensure that the appropriate thank-you notes are sent to all conference and program committee members.
- ACM SIGSOFT and IEEE-CS TCSE will present to the General Chair and the Program Co-Chairs a Certificate of Recognition.
- Endorse all catering changes.

M. Final Reports

- Together with AC and conference leaders, prepare a final financial report on the conference no later than four (4) months after an ICSE conference. The co-sponsors will receive their share of the surplus funds or will cover their share of a loss not later than thirty (30) days after AC validation of the final financial report.
- Prepare a final report for the conference and submit it to SC Chair and AC no later than 120 days following the conference. The final report should include:
 - A copy of the TMRF with actuals provided in the designated columns.
 - All registration details (i.e., fees and number of attendees for each category) which will help organizers of future conference.
 - List of conference participants
 - Fund-raising strategy and report
 - Publicity strategy and report
 - Conference management strategy
 - Lessons learned and a critique of problem areas and list of things you would have done differently. This will greatly enhance the planning efforts of future conference organizers.
 - Note that this information will be posted on the ICSE conferences archival website as a reference for future conference leaders.

N. Chain of Accountability

- The General Chair is responsible for overseeing the technical, financial, administrative and logistical management of all activities related to the conference and for upholding all policies and procedures of the AC.
- The General Chair is responsible that no major expenses are incurred until the TMRF is approved by AC.
- The General Chair is responsible that ACM, IEEE-CS, ACM SIGSOFT, IEEE-CS TCSE, and potentially other co-sponsors are featured—equally—on all conference and particularly publicity materials (e.g., wherever ICSE is mentioned) including conference calendars at the societies, conference web site, letter head, printed materials, call for papers, call for participation, registration forms, fliers, proceedings, CDs, conference bags, signage).
- The General Chair is ultimately responsible for the revenue and expenses of the conference and, thus, responsible for delivering on administrative fees as well as contingency and profit margins as required by the co-sponsors. Note that the TMRF is a living document and keep the spreadsheet up-to-date throughout the conference planning to stay on top of the budget.
- The General Chair is responsible that the conference planning stays on track and does not fall behind schedule.
- The General Chair is responsible for periodically reviewing the activities of the conference sub-committee co-chairs and members. If need be, the General Chair has to replace conference sub-committee chairs or add an additional co-chair.
- The General Chair, together with AC is responsible for delivering the final financial report on the conference no later than four (4) months after an ICSE conference.

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- The General Chair is responsible for delivering a final report for the conference and submitting it to SC Chair and AC no later than 120 days following the conference.

ICSE Guidelines

Part E

Responsibilities of ICSE Conference Program Co-Chairs

- I. Accountability and Reporting**
 - The Program Co-Chairs of an ICSE report to the ICSE General Chair.
- II. Duration of Appointment**
 - The term of appointment for an ICSE Program Chair is 18-24 months.
- III. Responsibilities and Obligations**
 - To oversee the activities of all program committee members (PC).
 - To build a technical program to support the objectives of ICSE.
 - To produce the ICSE conference proceedings, but not workshops proceedings.
 - To serve as a focal point for communications between the conference committee and the program committee.
- IV. Selection Criteria for General Chairs**
 - Must be a member of ACM or IEEE.
 - Must be of sufficient stature within the ICSE software engineering community.
 - Must be able to run a PC meeting effectively.
- V. Major Responsibilities**
 - A. Appoint Program Committee**
 - Recruit and appoint Program Committee members at least one year in advance of the conference.
 - With assistance from the General Chair and ICSE SC, develop a list of potential PC members.
 - For a balanced committee, consider the topics covered, expertise, seniority, university/industry affiliations, geography, and gender.
 - When recruiting PC members, be clear that attendance at PC meeting is mandatory—a member is dropped off the PC if he/she fails to attend.
 - It is recommended that a standard template (e.g., one developed by previous PC Chairs) be used when soliciting PC members.

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B. PC Meetings

- Set up a first PC meeting at ICSE-1 (previous year ICSE).
- Select a date and location for the PC meeting approximately six months before the conference.

C. Paper Submission Procedure

- In consultation with General Chair and ICSE SC, establish a specific and documented process for paper submission and review with appropriate infrastructure and documentation.
- Select and contract for a web-based submissions system to handle all ICSE submissions (i.e., workshop proposals, tutorial proposals, special track papers and workshop papers; work with the manager of the web-based submissions system to set up the details of the system for ICSE use.
- Study and test the web-based submissions system before operation—for submission, review, and PC meeting operations.

D. Publisher

- In consultation with General Chair, decide on a publisher.

E. Timeline, Policies and Practices

- In consultation with General Chair and publisher, prepare a timeline, deadlines, and a budget for all program related activities including submission, review, acceptance and final paper due dates. Work with publisher on final paper submissions date and then work backwards to determine the appropriate timeline.
- Contact the previous ICSE Program Co-Chairs and verify general policies of acceptance and page limits. Consult with the General Chair to ensure there is general agreement on these practices.
- Assign responsibilities (e.g., “best paper” awards) to PC members and review timelines and budgets for these activities.

F. Call for Papers

- Develop a theme and tracks for the program and develop the Call for Papers (CFP).
- Coordinate with General Chair and Publicity Co-Chairs on the CFP.
- Solicit papers
- Publish the CFP using web sites, mailing lists, and ads and within budget constraints

G. Paper Reviewing Process

- Receive papers
- Reviewer preferences, conflicts, bidding
- Solicit reviewers
- Orchestrate the reviewing process
- Prepare extensively for the PC meeting
- Plan for the PC meeting including logistics

H. PC Meeting

- Conduct and direct the PC meeting
- Manage conflicts effectively
- Inform authors of accepted and rejected papers in a timely manner.

I. Program Development

- Develop the structure of the final program within the framework of the entire conference as outlined by the General Chair and previous conferences.
- Get the program on-line as quickly as possible after the PC meeting.
- Provide materials on program content to the promotions chair in a timely manner.
- Develop the program carefully to minimize “overlaps”.
- Recruit session chairs. Manage the arrangements for session chairs and provide them with the information they require, such as speaker names and telephone numbers, introductory information concerning speakers, session times and locations.
- Manage all speaker communication (e.g., letters of invitations to speakers, promotional information, biographical information, session times and locations)
- Track author registration.

J. Best Paper Awards

- Manage several “best paper” awards:
- ICSE Most Influential Paper Award (ICSE N-10)
Process. The only requirement of the process is that it be conducted by the ICSE N program committee. Most recent PCs have delegated the process to a respected member of the community (often, but not always, a member of the ICSE N PC).
Plaque. A sample is provided on the icse-conferences web page (ppt, pdf); the program co-chairs are responsible for personalizing the plaque and producing one for each author.
Program. No single, standard approach has been adopted both in terms of the actual presentation of the award and also in terms of any presentation one or more of the authors may be asked to give at ICSE.