



Guidelines for CSME-Organised or Sponsored Events

(International Congresses, Conferences, or Symposiums)



(Current version approved on 29 Nov 2020)

One of CSME's primary roles is to train and update the mechanical engineering community on new advances and emerging fields. The CSME International Congresses form an important platform to acquire and disseminate such information to its members. The CSME also promotes mini conferences/symposia organised by Technical Committees or local chapters at various universities or industry events.

To standardize and streamline the organising processes, the following guidelines are promulgated by the CSME Board of Directors:

General Guidelines:

1. Technical Committees (Chair or delegate) are invited to organize TC-related symposia at CSME International Congresses and, a majority of TCs are expected to take up this opportunity each year.
2. The event dates should be checked with CSME Executives to ensure there is no conflict with other events of importance to CSME members.
3. All events organised by CSME will come under the title "CSME-SPONSORED" and will be organised by the appropriate committee or chapter.
4. In all these events, different registration fees should be offered for members and non-members. It is suggested that a base fee be set for members and the fee charged to non-members be higher by approximately 10% or \$50 in order to provide an incentive for membership. In addition, consideration should be given to allow one-day registrations in the case of multi-day events.
5. Proposals to hold CSME events with another organisation or multiple organisations (other than the host organization) shall be based on a cost/revenue arrangement to be negotiated between organisers and submitted for approval by each respective party. The objective is to strengthen both the national and the regional organisations and their abilities to promote future events more rigorously. Revenue can be achieved through registrations, sponsorships, or via other collaborative / promotional opportunities.
6. It is imperative that conference organizers consult with the CSME Congresses Committee before setting the final registration fee structure. The events should be self-supporting and ideally budgeted to generate some net income that can be shared between the hosting organization and CSME in accordance with a pre-set or negotiated income-splitting formula. In the case of the annual CSME International Congress, the pre-set formula shall be 60% to CSME and 40% to the hosting organization.
7. Information should be provided to the CSME head office, so it may advertise these events on the website and, depending on timing, in the CSME *Bulletin*.
8. Upon request, the CSME will also permit its name to be used as a sponsor of technical meetings/conferences organised by other technical societies. In such cases, CSME's support will generally be limited to promotion of these meetings on the website.

Special Considerations for the CSME International Congresses:

The CSME International Congresses are major conference events that take place every year under the responsibility of the CSME. Given their importance to CSME's objectives and service to its members, the CSME has set up a Congresses Committee composed of the following members: a Chair (who has previous experience at organising congresses), the past two Congress Chairs, the current Congress Chair, the next two Congress Chairs and, ex officio, the society's Executive Director (non-voting). As per the bylaws, the President and Senior Vice-President are ex-officio members (voting). This Committee is responsible for maintaining these Guidelines and promoting best practices on Congress processes/procedures including budgets, venue and agreements. It is imperative that each Organising Committee maintains close contact with the CSME Congresses Committee and follows specific guidelines presented below:

1. APPROVAL

The CSME International Congress is hosted annually by one of the Canadian Universities (School of Engineering or ME Dept). The Host University is expected to organise the event with substantial autonomy except as outlined below. The proposal to host a CSME International Congress shall be submitted to the Board of Directors at least two years prior to the proposed Congress year. The specific dates and budget for the event must be approved by the CSME Board at least one year in advance. Prior consultation with the CSME Congresses Committee is highly encouraged at all approval stages.

2. ORGANISATION

Organising Committees shall consider the recommendations presented in ANNEX A.

3. ANNOUNCEMENTS

The conference website outlining the call for papers, key dates and different conference tracks should be available one year in advance of the scheduled conference, and typically be promoted during the CSME International Congress that year. Typically, the Congress should be scheduled between mid-May and mid-June. The initial abstract submission deadline should be around January 15 in the year of the Congress.

4. FINANCES

CSME can provide seed money; however, the local CSME International Congresses organizing committee has the financial responsibility. The minimum financial intent of this event is to make enough money to cover all the expenses and return the seed money to CSME. In the process, if any net income or loss is made, then it will be shared between the local host organisation and the CSME as follows: 40% host organization, 60% CSME. If it becomes anticipated that a significant loss is possible (i.e. more than two times CSME's share of the seed money), then the Organising Committee Chair shall so inform CSME Executives and adequate measures considered to minimise the loss. It is up to the host organisation to ensure that negotiated arrangements with third parties (e.g. joint conferences) are satisfied and to decide how they wish to use their part of net income, though they are encouraged to use profits in support of CSME-related activities.

5. REGISTRATION FEES

For year-to-year consistency purposes, the CSME Board has established a set of standard fees for CSME International Congress registrations (applicable taxes extra). These fees should apply irrespective of the attendance mode (in person or virtual). Deviation from such standard is possible but subject to approval of the specific Congress budget by the CSME Board of Directors.

Category	Early Bird	Regular (online)	Onsite**	Banquet (delegate)	Banquet (extra tickets)
CSME Member – Professionals	\$500	\$600	\$700	\$50	TBD***
CSME Member – Students and Post-Docs	\$350	\$400	\$450	\$50	TBD***
Non-CSME Member – Professionals	\$650	\$750	\$850	\$50	TBD***
Non-CSME Member – Students and Post-Docs*	\$435	\$485	\$535	\$50	TBD***

Notes:

- * Includes 1st year CSME professional membership fee of \$85 (**optional**) to be remitted to CSME National Office.
- ** Depending on timing, the option of buying a banquet ticket might no longer be available.
- *** Price for additional tickets (e.g. family, friends) to be determined by the local Org cttee.

6. PROMOTION

CSME’s head office will help advertise the event on the CSME web site. It is also requested that the organisers provide electronically the email addresses of the registered participants and all other individuals who were sent the CSME International Congress/Conference literature. CSME will keep the list updated and forward it to the organizing committee of the next CSME International Congress.

7. WEB SITE

The responsibility for paying an annual domain fee and for developing a Congress web site belongs to local CSME International Congress organisers. If at all possible, local organisers will use the reserved domain url “www.csmecongress.org” as the official Congress web address.

8. PARTICIPATION by TCs

CSME Technical Committees will help organise the various sessions or symposia. The Chair of the CSME Technical Committees will be invited and given a priority to organize and/or co-organize the relevant Conference track. The CSME International Congress organizers should get in touch with the CSME Technical Committee Chairs 12 months in advance of the scheduled conference (typically at the conclusion of current year’s Congress) to invite them to attend / help organize a session/track.

9. PLENARY SPEAKERS

It is suggested that two plenary presentations be scheduled each conference day (total of 5 or 6). Up to three plenary presentations should be reserved for potential winners of CSME Technical Awards who would be invited to deliver plenary lectures at the CSME International Congress. It is expected that the CSME Awards Selection Committee will identify the 3 technical award winners (if any that year) by mid-October the year preceding the Congress so that organisers have adequate time to invite them to attend and present their plenary lectures.

10. INTERNATIONAL PARTICIPANTS

International participation is encouraged, and organizers should facilitate the attendance of international delegates.

- The organizers should register the CSME International Congress with the [Special Events Unit at Immigration Refugees and Citizenship Canada](#) to receive an Immigration Refugees and Citizenship Canada Special Event Code.
- The organizers should issue a personalized invitation letter to each international attendee which references the above-mentioned Special Event Code (see template in ANNEX B). It is strongly recommended that the organizers issue the invitation letter only once the attendee has registered. Interested attendees should be informed of the necessity to register early to allow enough time for them to obtain necessary visas.
- It is strongly recommended that the organizers carefully examine the validity of the information provided by the international attendees (exercise due diligence as per IRCC guidance).

Special Considerations for Mini-Conferences/Technical Symposia:

1. Local/regional events should be coordinated with CSME Technical Committees and local Chapters.
2. The finances should be worked out with the CSME Treasurer, as local chapters may receive funds from the CSME to organise events within their region.
3. Depending on the circumstances and the size of the event, the CSME may also provide some seed money to help the organization get started. However, every effort must be made to make the event self-supporting so that the seed money is returned to the CSME prior to distribution of any event net income.
4. These events should focus on particular topics or emerging fields in mechanical engineering – hence the need to coordinate with the relevant Technical Committees.
5. The logistics of the event is the responsibility of the local organisers.
6. Interested participants should receive Continuing Education Units (CEUs) or Professional Development Hours (PDH) credits registered through [EIC's eLearning Centre](#).
7. As these are local or regional events, an attempt should be made to also involve universities and industry within the region in question.

Scheduling Recommendations for Organization of CSME International Congresses

Length of the Congress:

Option (i): 3 days (preferably starts on Monday, ends on Wednesday)

- Day 1: official opening by CSME President
meetings of Technical Committees (1 hr)
opening reception in the evening
- Day 2: CSME Board and AGM meetings
banquet in the evening, awards ceremony during banquet
- Day 3: meeting of ME chairs
official closing by CSME President (at end of closing lecture)
departure after 16:00

Option (ii): 4 days (preferably starts on Monday, ends on Thursday)

- Day 1: official opening by CSME President
meetings of Technical Committees (1 hr)
opening reception in the evening
- Day 2: CSME Board and AGM meetings
banquet in the evening, awards ceremony during banquet
- Day 3: half day reserved for social events
meeting of ME chairs, laboratory tours for ME chairs
- Day 4: official closing by CSME President (at end of closing lecture)
departure after 16:00

Plenary Speakers:

- (i) Up to two speakers per day.
- (ii) Maximum of 1/3 speakers from the host university. The balance should come from the rest of Canada or international.
- (iii) Travel expenses for each plenary speaker: pay travel cost up to \$1500 and waive registration fee.

Registration fees:

- (i) Local organizers determine registration fees.
- (ii) Registration fees for regular CSME members should be 10% or \$50 less than regular registration.
- (iii) Students pay registration fees set up by the local organizers. No special reduction for students who are CSME members.
- (iv) Unless otherwise approved by the CSME Board when they approve the Congress budget proposal, standard registration fees should be the same for delegates attending in person or by virtual means.
- (v) The CSME will offer to non-member Congress participants free CSME memberships for the remainder of the same calendar year.

(All yellow-highlighted text must be customized)

Visitor's Name

Department

University

Country

Re: Visa Invitation Letter for the CSME International Congress YEAR

Dear Visitor's Name,

On behalf of the organizing committee, I am pleased to confirm your registration for and invite you to attend the International Congress of the Canadian Society for Mechanical Engineering (CSME), which will be held at (HOST LOCATION), from (DATES). [If applicable] I would also like to confirm acceptance of your submitted abstract/paper [choose one]. Please note that there will be no financial assistance provided by the CSME International Congress Organizers; therefore, all expenses associated with travel, accommodations, meals, and transportation must be covered independently.

The Immigration Refugees and Citizenship Canada Special Event Code for this event is: CODE (provided by IRCA, e.g. 20CSME)

Foreign visitors wishing to enter Canada must have a valid passport, and most will also require a Canadian visa or an electronic Travel Authorization (eTA). To determine if you need a visa or an eTA, please visit: <http://www.cic.gc.ca/english/visit/visas.asp>.

Canada does not have a visa office in every country. To find the Canadian visa office responsible for processing your visa application, please visit: <https://www.canada.ca/en/immigration-refugees-citizenship/corporate/contact-ircc/offices/international-visa-offices.html>

The visa processing time varies depending on the visa office and time of the year. To ensure that you receive the visa on time, please apply approximately **12 weeks** in advance of your departure date.

Depending on your nationality, you may be required to give your biometrics. For more information about biometrics, please visit: <https://www.canada.ca/en/immigration-refugees-citizenship/campaigns/biometrics/facts.html>

We look forward to your participation at the CSME International Congress,

Sincerely,

Name

(Co-)Chair of Organizing Committee

WORK ADDRESS

Email: XXX

Tel: XXX

Congress website url: XXX