

YOUR GLOBAL PARTNER FOR
TECHNOLOGY ALLIANCE SOLUTIONS



ISTO | **IEEE**
INDUSTRY STANDARDS AND TECHNOLOGY ORGANIZATION

WHERE TO GO TO FORM YOUR GROUP AS A LEGAL OPERATING ENTITY

The IEEE Industry Standards and Technology Organization (ISTO) offers today's industry associations, trade groups, consortia and SIGs (special interest groups) an efficient and effective way to form a technical organization with missions that support industry on a global basis.

Forward thinkers in industry, including competitors, understand the importance of collaborating and innovating to expand an ecosystem. That kind of collective initiative requires legal, administrative, operational and shared IT infrastructures, as well as effective communications channels, to ultimately succeed.

Investing in this support on your own can cost you significant time, energy, funding and resources—all of which can be better spent supporting your organization's work initiatives.

ISTO is a 501(c)(6) not-for-profit federation of industry alliances that offers operational and legal infrastructure to meet today's technical collective aims. ISTO support is offered by a seasoned staff well versed in providing a range of professional and effective program management – from financial management, project management, standards/specifications development, certification and test program support to legal registrations, brand protection, marketing communications and event planning.

By joining the ISTO Federation, your organization reaps the following benefits:

- + You may form your group in days operating under ISTO's 501(c)(6) legal umbrella. This saves you months to years of effort and resources in self-incorporation and applying for not-for-profit status. Moreover, the risk and liability for your association fall to the Federation and not your group. Although you operate within an umbrella Federation, your group operates autonomously on work product and intellectual property that it owns.
- + ISTO's experienced and proven staff manages your daily program operations—from onboarding and retaining membership, to finance/accounting, to certification and compliance program support, to communications—freeing your members to focus on the core mission.
- + Control your own destiny—you define your membership, your technologies, your initiatives and timelines, and your bylaws and processes (with ISTO guidance). Let ISTO support your vision and direction through our experience and best practices.

ISTO is the fastest, smartest and most economical way to form your organization—and the most effective way to develop specifications, promote technologies, support compliance and ensure your solution's market acceptance and adoption.

Forming a new industry organization? Consider ISTO:

- + Only provider that offers a fast path to incorporate your new initiative
- + Immediately provides the required legal and operational infrastructure
- + Efficient and effective help in getting through the complex maze of forming and maintaining your industry organization

SCALABLE AND CUSTOMIZED SUPPORT BOOSTS YOUR GROUP'S PRODUCTIVITY AND BOTTOM LINE

We offer a wide range of customizable and scalable options to match any group's needs at any point in their evolution. ISTO expertise spans the following support disciplines:

- + Alliance Operations
- + Legal Infrastructure
- + Strategic Guidance
- + Marketing, PR and Event Management
- + Certification and Test Programs
- + Tools of the Trade









ALLIANCE OPERATIONS

Dedicated support for smooth operations and steady momentum

Once your organization is operational, it needs to be cared for and managed. While volunteer participation is necessary for organizational success, it cannot be counted on to ensure your group runs smoothly and effectively.

For that, many organizations turn to ISTO. They rely on our skilled and experienced staff to run daily operations so that your members can focus on initiatives that support your group's mission.

ISTO offers the following operations support:

-  Formation and Launch
-  Executive Leadership
-  Technical Project Management
-  Financial Management
-  Membership Management
-  Board Secretariat
-  Working Group/Committee Support
-  Standards/Specifications Development
-  Certification and Test Program Support
-  Legal Registrations and Trademarks
-  Contract Administration
-  Marketing, PR and Event Management

For each member alliance, ISTO assigns a dedicated program manager who serves as your primary account manager and communications conduit. Regularly scheduled sync calls between ISTO program managers and member alliance stakeholders ensure that communication is constant and requirements and contracted support goals are met.

LEGAL INFRASTRUCTURE

Saving you time, energy and resources

With our legal framework, ISTO can set your organization up as a functioning not-for-profit in a matter of days, saving your organization time, money and resources.

How?

ISTO is a federation of member alliances focusing on the advancement of technologies that expand ecosystems in industry. Member programs of ISTO share in the governance of our organization. In return for membership dues and shared common costs, each of our programs is afforded the unique opportunity to leverage the ISTO not-for-profit tax status while maintaining its own independent governance and autonomous operations.

Benefits of ISTO Federation membership include:

- + Infrastructure – Member alliances benefit from ISTO’s legal umbrella under which the not-for-profit status can be shared. In addition to cost savings, joining ISTO takes the guesswork out of submitting an application to the IRS for not-for-profit status, which is not assured.
- + Liability Insurance/Indemnification – ISTO carries a comprehensive package of insurance policies (renewed annually) to cover all member programs organized under its legal umbrella. Coverage includes policy clauses such as Directors and Officers (D&O), Errors and Omissions (E&O) and general liability.
- + ISTO Membership – By joining the ISTO Federation, member programs may participate in cross-program activities such as ISTO Program Leadership Caucuses, the ISTO Annual Member Meeting and the nomination and election of ISTO Director candidates.
- + Independent Formation – If preferred, ISTO can manage the self-incorporation of any member program and oversee the submission and filing of IRS Form 1024 to apply for not-for-profit status. In addition, ISTO can provide the financial and operational functions required to support your new self-incorporated entity. We are knowledgeable of all legal, tax and audit requirements for 501(c)(6) entities, and we can provide the services to ensure your legal compliance as a new not-for-profit organization.

STRATEGIC GUIDANCE

You know your goals – we know the roadmap to get you there!

More and more businesses in today’s high-technology industry sector can be found using industry alliances as a means to achieve their specific business goals. When alliances are robust and solutions-oriented and active with member participation from the ecosystem, businesses benefit. And that’s where ISTO comes in. We not only form industry alliances and establish the proper infrastructure for operational excellence; we partner with governing boards, provide technology evangelists and executive directors, and spearhead marketing committees and other initiatives in an effort to keep your organization robust, active and fulfilling your mission.

Since 1999, ISTO has been partnering with members of the global technology community, supporting groups and promoting the market acceptance of an array of technical solutions and standards. ISTO support spans many electro-technology sectors, from lighting...to IoT...to mobile...to wireless power...to eHealth technologies and more. ISTO delivers guidance and strategic support that yield results.

You know your goals – we know the roadmap to get you there. Let us work together to get your organization where you need to go.

Best practice and knowledge you can draw on:

- + Formation Assistance – ISTO helps you develop the shape, direction and membership for an effective organization. Draft mission statements and governing documents including bylaws, IPR policies and membership agreements. Set up bank accounts, financial statements, contract templates and more. Construct and promote your brand, including logo and website development, email reflectors, registrations and membership systems.
- + Association Management – ISTO provides executive-level strategic and tactical support for both broad goals and specific committees and working groups.
- + Membership Administration – ISTO excels at processing and managing your primary revenue channel – your membership. From recruitment to retention, ISTO is your front-line resource to support membership requirements, manage member requests and provide important trending data to inform on the fiscal health of your organization.
- + Patent and Intellectual Property Licensing Administration – ISTO provides a neutral administrative forum for managing IP according to the rules you create.
- + Test and Certification Programs – ISTO provides a broad and flexible range of options and support for compliance, interoperability and other test programs sponsored by today’s alliances. Certification support can include certification mark design, logo license administration, support for registered product databases and more.
- + Event Planning and Marketing – Whether your requirements involve planning a week-long summit or coordinating member-hosted meetings, ISTO provides the support you need, scaled to your specific requirements. Marketing communications support is also provided, including PR, social media, blogging, vlogs, e-newsletters, surveys, evaluations, webinars, etc.

MARKETING, PR & EVENT MANAGEMENT

Share your cause with your industry

To maintain industry traction and ecosystem support for your group's activities, you need a constant cadence of communication to your industry. Sending the right message to the right audience at the right time is key...

At ISTO, marketing communications involves listening to our groups and their goals, understanding their audience, crafting smart messaging and devising/executing strategies that meet or exceed formal measures of success. ISTO supports all marketing deliverables including white papers, webinars, member surveys, infographics, branded materials...the list goes on.

- + Strategic communications planning – identifying goals, audience, tactics, execution and measurement
- + Communications and collateral development, including brochures, e-newsletters, contributed articles, white papers, signage, infographics, handouts, etc.
- + Single point of contact connecting you with vendors for cost-effective production
- + Public relations support, including strategic planning, media relations and direct contacts with key industry influencers
- + Conference and trade show presence coordination
- + Website design and content creation and maintenance
- + News monitoring services and analytics

ISTO is very skilled at managing all aspects of your event, be it a board meeting of 20, a standalone trade show exhibit or a leading industry event with 5,000+ attendees.

ISTO Event Management Services include:

- + Venue site visits and selection
- + Venue and related contracted services (e.g., audio/visual, socials, food and beverage, etc.) negotiation and administration
- + Ongoing vendor relations with all contracted vendors
- + Event budgeting and reporting
- + Event promotions, including website promotions, mobile device promotions, banners, signage, invitations, calls for speakers or participants, if applicable
- + Event registrations, including registration site development, on-site registration support, badges, etc.
- + On-site event logistics and lead generation

CERTIFICATION & TEST PROGRAMS

Certification and test programs that secure your market adoption

Certification and test programs are fundamental to gain market adoption of technologies. ISTO has solid experience supporting a variety of certification, interoperability and conformance test programs.

Whether you are testing for component interoperability, determining standards compliance or certifying technical competency, ISTO can help you develop and administer a successful test program:

- + Interoperability Testing & Certification
 - + Designing/registering certification marks
 - + Supporting the drafting of formal test suites and other test scripts
 - + Administering contracts with test labs and other facilities
 - + Administering the test process including registration, payment and test execution
 - + Supporting logo/mark licensing programs
 - + Supporting online databases of registered products
- + ISTO serves as a neutral party and ensures the highest level of confidentiality with all programs, test labs, test houses and testers.
- + ISTO can coordinate and execute the public launch of certification programs for member alliances.



TOOLS OF THE TRADE

Tools of the trade that are easy and work!

ISTO offers an array of tools to ensure your organization's productivity and security. From membership systems to collaborative environments to web development, there's a tool to facilitate the work at hand.

Tools Available:

- + Membership Management Systems that are fully integrated with group calendaring, committee dashboards, eVoting modules, wikis, member rosters, email reflectors and secure document/communications repositories
- + ISTO ProtectSM – Market surveillance tools to protect your brand against infringement
- + Collaboration tools to support remote meetings, online communities, user groups and online specifications development
- + Website development, hosting and content/domain management
- + Systems administration – Development and management of databases, email programs, internal communications and other needs
- + Open source tools – ISTO supports open source repositories for code development and collaboration and other Web 2.0 tools
- + Media monitoring – Monitor news about your organization or related technologies



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