Conference Organization

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Getting Started

- Generally, a conference is initiated through the following steps:
  - An agency, board, or coalition is called on to serve as a conference sponsor.
  - A conference planning committee is appointed.
  - A conference coordinator is selected or appointed.
- Establish a clear purpose of the conference.
- Know what others are doing.
- Learn the needs of your target audience.
Conference Planning Committee

- A group of people that holds some responsibility for shaping the conference and planning the program.

- Look for persons to serve in the committee who:
  - Are qualified to serve due to their experience on substantive issues, respect given to them by professionals in the field, or their organizational, negotiation, or communication skills.
  - Are dependable.
  - Are able to accept responsibility.
  - Work well with others.
  - Can make decisions.
  - Can abide by the decision of the majority.
Typically, the Conference Planning Committee shares responsibility with the Conference Coordinator and the Sponsor for the following three functions:

- Serve in an advisory capacity.
- Approve scheduling and logistical decisions.
- Respond to recommendations and suggestions on conference content.

Document the responsibilities to avoid conflicts.
Committee Coordinator

- Issues coordinator need to address:
  - Will committee members be compensated for their time or reimbursed for meeting expenses?
  - How often will the committee meet?
  - How long will the committee exist?
  - Will the committee evaluate the conference?
  - Will the work of the committee be recorded for future use?
  - To whom is the committee responsible?
The Conference Coordinator

- Look for a person who:
  - Possesses good organizational skills.
  - Is a good communicator.
  - Has an eye for details.
  - Can function well even if things get a little stressful. A good sense of humor is a big plus.

- 2 ways to select a conference coordinator
  - Member of conference planning committee.
  - Sponsor designates a coordinator.
    - Internal – member of sponsoring agency.
    - External – a person who is exceptionally skilled in conference planning.
Management Functions

- Prepare a conference budget.
- Set the schedule for completing tasks leading to the conference.
- Conduct site visits.
- Negotiate contracts with hotels/meeting facilities.
- Recommend and correspond with speakers/entertainers/exhibitors.
- Prepare session descriptions.
- Set the flow of the conference and plan the program.
- Recruit and train conference staff/volunteers.
- Manage conference crises.
- Authorize onsite expenditures.
- Develop session and conference evaluations.
- Ensure bills are paid.
Administrative Functions

- Organize, schedule, and staff Conference Planning Committee meetings.
- Develop conference notices, brochures, and registration forms.
- Communicate with conference registrants.
- Order conference supplies, materials, and equipment; work with suppliers.
- Prepare name badges, signs, banners, and the program book.
- Order room setups for all workshops/sessions.
- Handle logistics for VIPs.
- Recruit and train conference staff/volunteers.
- Process conference registrations in the office and onsite.
Number of Participants

- Things to consider:
  - Target audience.
  - Conference budget.
  - Number of meeting rooms and room capacities.
  - Hotel accommodations
  - Number of conference staff and volunteers
  - Size of ballroom or banquet facility.
  - Conference dates.
Conference Dates

- A timetable of at least 12 months to organize a conference.

- Consider hotel and meeting facilities selection – location, dates and price.
  - Peak/value/shoulder periods.
  - Many hotels split the week into 3 time slots:
    - Sunday-Wed; Wed-Friday; Fri-Sunday.
Conference Dates

- Establish first, second, and third date preferences.
- Thoughts should be given to when selecting a preference dates:
  - Dates of other conferences competing for your target audience.
  - National and religious holidays and events.
  - Expected weather conditions.
  - Dates of school openings and closings.
  - Peak convention seasons.
Conference Budget

- Preparation involves sponsor, the planning committee, and the coordinator.
- The coordinator should control the budget.
- A budget is a planning document and a management control document.
  - Anticipated conference expenses.
  - Conference funding sources.
  - Projected conference revenue.
Preparing the Budget

- Conference planners need to prepare *split folio*.
  - Split folio – determines which cost will cover by the conference *master account* and which will be paid by persons attending the conference.

- Be sure to clearly communicate your split folio plan to the hotel, in writing, when your *letter of agreement* is prepared.
  - Letter of agreement – written confirmation of agreements between you and the hotel what is sent our prior to the contract.)
Site Selection

- Start as early as you can.
  - 18 months before is not too early.
- Matching Conferences With Facilities.
- Conference History data and fact sheets
- Convention and Visitors Bureaus
- Site Inspections
Site Selection – Matching Conferences with Facilities

- Downtown hotel in large city
  - Attendees are in meetings most of the day but have large blocks of personal time around lunch or in the evening.

- Airport hotel/airport meeting facility
  - Conferees flying in for a one- or two-day conference.

- Suburban hotels
  - If many conferees will be driving to the meeting.

- Conference center
  - Intensive training and need to avoid distractions.

- Resort properties
  - Provide bargains during off-season or shoulder periods.

- Convention center
  - Used for very large conference when hotel don’t work.
Wanted by Conference and Visitors Bureaus (CVB), hotels and other conference facilities.
- a well-documented record of past conference, if a similar conference was held in the past.

Conference History data must include:
- Conference dates/locations.
- Number of sleeping and double occupancies / rooms picked.
- Number of meetings rooms used each day.
- Types of functions hold each day.
- Arrival and departure patterns.
- Food and beverage information.
- Activates planned away from conference site.
Site Selection - Fact sheet

- Fact sheet should include:
  - Preferred conference dates.
  - Number of sleeping rooms needed meeting room requirements (number, size, and duration of use).
  - Food and beverage requirements.
  - Audience profile (shelter staff, etc.).
  - How facilities should submit bids (include contact person, agency, address, and phone and fax numbers).
  - When decisions will be reached (indicate whether site visits are required).
  - Conference history data.
Site Selection - Fact sheet

- You can mail fact sheets directly to each hotel and/or meeting facility.
  - If you already know which facilities can accommodate your needs.
- You can contact the CVB's in the locales you are considering. Ask the
  CVB's to send your fact sheet and your request for bids to only those
  facilities that fit your needs.
Planning the Program

- The program planning process should begin after the following steps have been completed:
  - The conference purpose has been defined.
  - The audience profile has been determined.
  - The number of participants has been estimated.

- A well-planned program interrelates the above three factors with conference events, presentation methods, and event scheduling.
Events

- Registration – check in, pick up conference material etc.
- Orientation – conferees learn more about the conference.
- Opening Session – keynote speaker set tone for conference.
- General Sessions (plenary sessions) – discussion of topics.
- Follow-up Sessions – Additional time for small group.
- Concurrent Sessions – Two or more sessions are held at the same time.
- Breaks.
- Workshop – group discuss common issues or interest.
- Closing Session – uplift conferees.
- Banquets – plenary breakfast, luncheons or dinners.
- Receptions – providing networking time for attendees.
- Tours/field trips – entertainment purposes.
- Free Time.
Presentation Methods

- Buzz group/session – audience is divided into small groups. Each member is asked to contribute ideas/thoughts.
- Case study.
- Clinic – participants respond or react to common experience.
- Colloquy – half the panel represents the participating audience and the other half are experts or professionals in the field.
- Debate.
- Dialogue.
- Interview.
- Panel – a group orderly presentation on an assigned topic.
- Role Playing.
- Speech – one speaker makes a formal oral presentation.
- Skit.
- Work groups – divided into groups with the goal of producing a product at the end of discussion.
Tips on Scheduling

- When overnight accommodations are required, schedule registration periods and events after hotel check-in is available and before check-out is required.
- Vary events between those with no alternatives and those that offer choices.
- When a conference lasts longer than a day, schedule free time.
- Spread intense sessions.
- Schedule sessions with stimulating presentation methods after lunch.
- Schedule breaks in between sessions.
- When conferees are "on their own" for lunch, provide information about restaurants, prices, and service time.
- Large groups need more time for networking than smaller groups.
Speakers and Presenters

- Call for papers.
- Choose a speaker.
  - Leads in the field.
  - Recommended by people in the field.
Searching for Speaker

- First decide what issues to cover, and then ask who is associated with that issue.

- Sample question format
  - "Who are some good people to speak on the political aspects of building community networks?"
  - Or, "who is a good person to speak on technology activism on issues affecting people with disabilities?"

- Once made a final choice on speaker, follow up with a letter.

- Two weeks before conference send a reminder letter.
Follow-up Letter for Speakers

- Location and address of the conference.
- Purpose of the conference.
- Size and general profile of the target audience.
- Topic of the presentation and length of time of the session.
- Layout of the room where the presentation will be given.
- Acceptable attire or dress requirements.
- Honorarium and expenses to be paid.
- Details regarding travel, accommodations, and where and when your conference representative will greet the speaker.
- A deadline for requesting audiovisual aids, if unknown at the time of the invitation, or a confirmation of what will be provided.
- A request for a picture or biographical material, as needed.
Executing the Conference Plan

- Registration
  - Exchange of information (sometimes money).

- Conducting Sessions and Events
  - Using signs.
  - Following the Agenda.
  - Staffing.

- Evaluation
  - Form a evaluation committee.
  - Evaluation form.
References

- [http://polaris.gseis.ucla.edu/pagre/organizing.html](http://polaris.gseis.ucla.edu/pagre/organizing.html)
Thank you!