

# Planning and Organizing an Annual Conference

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**Abstract**—Holding a successful conference year after year constitutes a hallmark of excellence for a professional society. While many factors contribute to the success of such a meeting, a key factor is careful planning and organization. To aid the first-time conference chairperson, this paper describes a systematic approach to conference planning and organization: (1) making preliminary analyses and assessments; (2) obtaining the agreement of cosponsors; (3) selecting key conference officers; (4) organizing conference committees; (5) selecting the conference site, hotel, and dates; (6) developing the conference master plan; (7) following through and implementing planning decisions; (8) anticipating and managing contingencies; and (9) coordinating post-conference activities. Using a systematic approach simplifies the task and makes it possible to run an annual meeting successfully.

## OUTLINE

### Introduction

#### Making Preliminary Analyses and Assessments

- Setting meeting objectives
- Analyzing the target audience
- Determining implementation methods

#### Obtaining the Agreement of Cosponsors

#### Selecting Key Conference Officers

- Selecting a conference manager
- Selecting the conference chairperson

#### Organizing the Conference Committees

- Determining the conference committees
- Selecting the committee chairpersons

#### Selecting the Conference Site, Hotel, and Dates

- Selecting the conference site
- Selecting the conference hotel
- Selecting the conference dates

#### Developing the Conference Master Plan

- Establishing a planning timetable
- Assessing meeting objectives and developing a method of approach
- Selecting the conference theme

- Determining the approach to the technical and social programs
- Planning for student involvement in the conference
- Establishing policies and guidelines for gifts and exhibits
- Setting audiovisual equipment policy
- Planning conference publicity and publications
- Preparing a tentative budget: Determining sources of funding and projecting costs

#### Following Through and Implementing Planning Decisions

- Preparing publications and the publicity campaign
- Selecting session chairpersons, workshop and tutorial leaders, and speakers
- Establishing a management system for handling submitted papers, author correspondence, and requests for information
- Making final arrangements with the conference hotel
- Arranging social programs and special events
- Setting registration fees and deadlines
- Finalizing the budget
- Establishing the program: Arranging technical sessions, socials, and special events
- Coordinating conference arrangements
- Setting the stage for the next year's conference

#### Anticipating and Managing Contingencies

- Identifying potential problem areas on an initial walk-through
- Reviewing conference arrangements with the hotel staff
- Overseeing the opening of registration
- Being available to answer questions and resolve difficulties

#### Coordinating Post-Conference Activities

- Writing letters of appreciation
- Ensuring that bills are paid
- Reporting the conference to society members
- Preparing the financial report for the society

#### Conclusion

#### Appendix: Guidelines for Planning and Scheduling Conference Publications

- Call for papers
- Announcements
- Author's kit
- Program
- Program highlights brochure
- Newsletter
- Descriptive abstracts
- Proceedings
- Registration packet
- Program addenda or errata
- Production alternatives

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## INTRODUCTION

The success of the annual conference of a professional society depends upon a number of factors, including the time and location of the meeting; the attractions of the local area and the local arrangements; the ability of the conference chairperson and planning committee to attract and select program participants and to organize technical sessions, socials, and special events; the extent of the publicity campaign and the quality of the conference publications; the cost of attending the meeting and the travel funds available to attendees; the quality of the technical program; and the number of program participants and meeting attendees. The individual who chairs such a conference for the first time may feel overwhelmed by the multiplicity of tasks that, seemingly, must all be done at the same time: Among them are formulating meeting objectives; devis-

ing a conference plan; organizing committees; developing and administering a budget; setting deadlines; planning technical and social programs; obtaining session chairpersons and speakers; scheduling, writing, editing, designing, and managing publications; arranging for publicity; obtaining support from industry; and coordinating local arrangements. Nevertheless, the job can be done. It requires careful planning and organization, delegation of responsibility to capable associates, and coordination of efforts, attention to detail, and adherence to schedule.

To aid the first-time conference chairperson, this paper describes a systematic approach to conference planning and organization and provides guidelines for carrying out the major tasks involved. As shown in Fig. 1, the process of planning and organizing a national (or international) annual conference can be divided into nine main steps. Individual

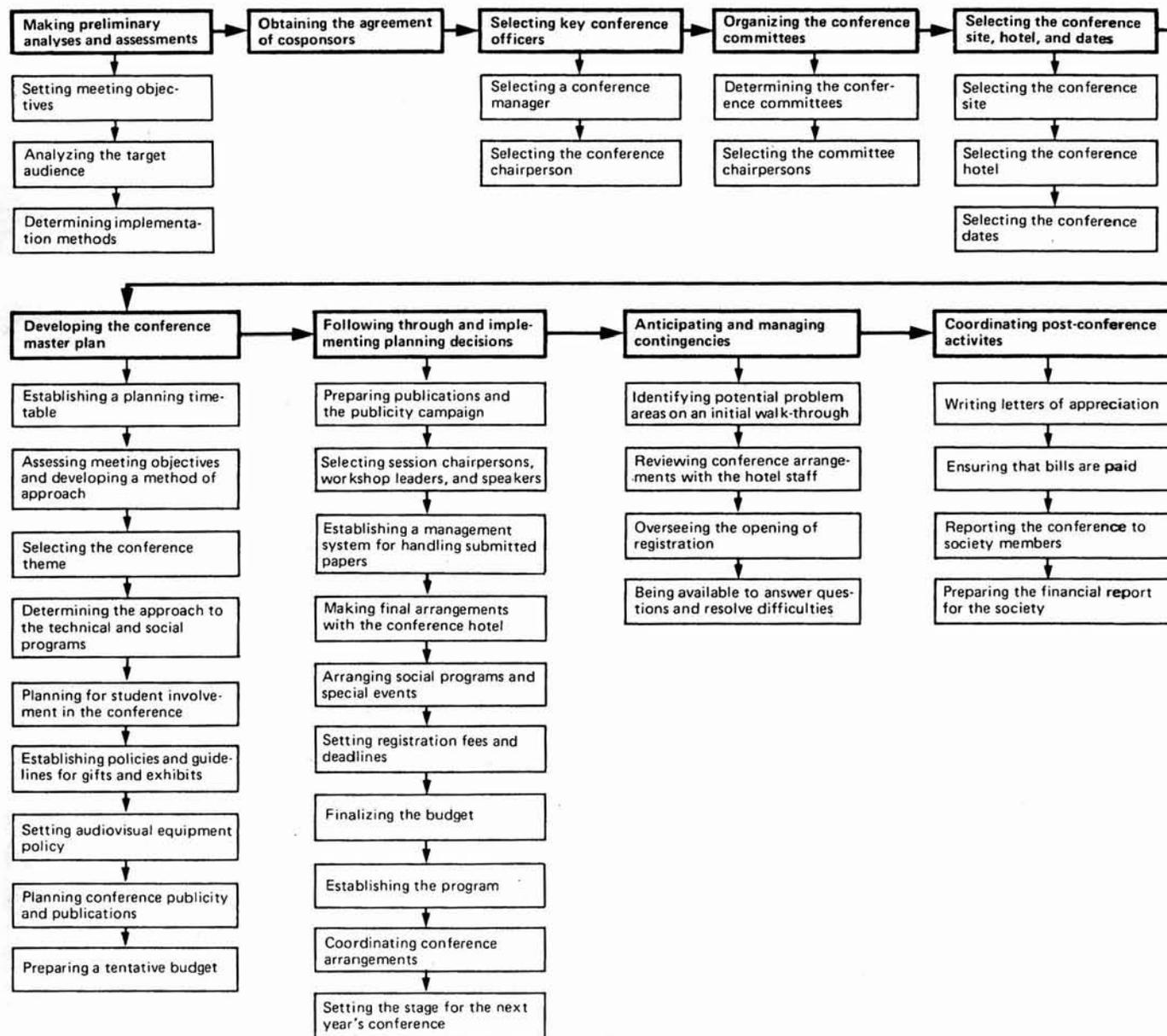


Fig. 1. Steps in planning and organizing an annual conference.