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

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Received November 19, 1982; revised April 25, 1983. The author is Director of Technical Writing at The University of Texas at Arlington, Department of English, P. O. Box 19035, Arlington, TX 76019; (817) 273-2692. 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

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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; devising 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.

tasks are described according to the timetable in which they are typically performed. Although general guidelines for planning, organizing, and running conferences are available (see, for example [1-8]), little has been written about the specific strategies and management approaches needed for a successful annual conference even though the vast majority of conference chairpersons are new to the task.

MAKING PRELIMINARY ANALYSES AND ASSESSMENTS

The first step in the process of planning and organizing a professional society's annual conference is preliminary analysis and planning. Completed by a combination of society officers, the society executive committee, and the long-range conference planning committee, this step consists of (1) setting meeting objectives; (2) analyzing the target audience; and (3) determining implementation methods.

Setting Meeting Objectives

One of the first considerations in conference planning is to formulate meeting objectives. These might be thought of in terms of (a) goals for the society and (b) rewards for meeting attendees. For example, does the society want to increase membership? To gain more recognition for the general public? To provide more services to members?

A number of goals are possible [8, 9]:

- · Generate interaction and communication
- · Serve the needs and interests of members
- · Conduct the society's business
- Inform members of new policies
- · Convey new information to attendees
- Provide educational opportunities: enable members to keep abreast of the latest developments in the field; to continually upgrade skills and knowledge; to maintain expertise in the discipline
- Give members an opportunity to present their research formally
- Provide a forum for exchange of ideas and experiences and creation of new ideas
- Provide an environment for free discussion of new concepts, research developments, and applications
- Foster progress and advance the state of knowledge in the discipline
- · Enable meeting attendees to make important contacts
- Enable meeting attendees, program participants, and society officers to interact socially
- Enhance the society's visibility.

The objectives set for the meeting should be based on the needs of those attending. Who is the audience? What does the society want the audience to know or do when they leave the meeting? What is the purpose?

For a successful annual conference the objectives should be

clearly defined and ranked in order of importance based on an analysis of the projected audience.

Analyzing the Target Audience

To aid in formulating meeting objectives, the following audience characteristics might be assessed:

- Is the audience a homogeneous one or is it heterogeneous, bringing together individuals from diverse disciplines or from several areas within a discipline?
- Are the main interests of the audience theoretical? Practical? Applied? Or a combination?
- What is the educational profile of the audience? Do the members have bachelor's degrees? Master's degrees? Doctorates? What is the percentage of individuals in each category? Are the degrees primarily in the same discipline or do they span a broad range?
- Are the members of the audience mainly novices in the field? Or do they have years of experience? If a combination, what is the proportion?
- What is the average age of the participants?
- Is the audience largely male? Largely female? Evenly distributed?
- Are the individuals employed primarily in academia? In business? In government? In industry? In private practice?
- Will the majority of the attendees be members or will a proportion of nonmembers attend as well? Will spouses be likely to attend?
- How many people can be expected?
- What is the regional, national, or international distribution of the potential attendees?
- How do the members of the projected audience envision the purpose of the conference?

The answers to the questions of audience are significant not only in formulating the general purpose of a conference but also in setting specific meeting objectives, selecting a conference setting, and designing the conference program of technical sessions, exhibits, social events, and tours.

To aid in formulating meeting objectives and arranging programs keyed to the needs and interests of society members, the program committee can include a questionnaire in the registration packets of those attending the conference each year. The questionnaire can combine an evaluation of the topics, format, and levels of presentation offered at that meeting with a list of possible topics and methods of approach for the next one. Members can also be asked to suggest topics and possible speakers or session chairpersons. Such information can be advantageous in determining what types of sessions and events to include and the amount of emphasis to be devoted to each.

Determining Implementation Methods

After objectives have been formulated, the conference format must be selected and implementation methods must be determined. Among the questions to be considered are the following:

- Should the conference be held as an independent event or in conjunction with another meeting?
- Should other societies be invited to cosponsor, participate, or cooperate in the meeting?
- What types of technical sessions and program events should the conference include? Individual presentations? Panels? Symposia? Lectures? Plenary sessions? Debates? Tutorials? Workshops? Short courses? Poster sessions? Roundtable discussions? Idea exchanges? Demonstrations? Professional tours?
- What social events should be included? Breakfasts? Luncheons? Banquets? Receptions?
- What supplemental activities should be included? Recreational programs? A spouses' program? A family program? Tours?
- What committee, business, or special-interest-group meetings will be held in conjunction with the conference?
- How many days should the conference last?
- At what time of year should the conference be held?
- What setting would be most effective for the meeting format proposed? A major hotel in a major metropolitan area? A resort hotel in a recreation area? A college or university campus?
- Who will manage the conference? Who will make the conference arrangements? A conference committee? Society officers? Society staff? Members of a local chapter? A professional conference manager? A convention bureau? Volunteers? Paid staff?
- Who will be responsible for overseeing implementation of the plans?
- What image does the society want to convey to the members and other attendees through the conference?
- Should the conference include a proceedings? What other major publications should be developed?
- How will the conference be funded? Should exhibits be included? Should industrial gifts be sought?
- What proportion of the society budget should be allocated for the conference start-up costs and possible overruns?

Once major policies have been set and implementation methods have been determined, preliminary conference arrangements can begin.

OBTAINING THE AGREEMENT OF COSPONSORS

If the annual conference is to be sponsored jointly with another professional society, the second step in the process is to obtain detailed letters of agreement. Cosponsorship implies significant involvement in the technical, financial, and administrative areas of the conference [7] and decisions must be made about the exact nature of the involvement. Will the names of both societies be used as cosponsors? Will the two societies share equal planning responsibility? Equal funding responsibility? Equal billing in publicity? Will one



society have the primary responsibility for developing the technical program? The social program? For making conference arrangements? Will any restrictions be imposed on funding, types of events, or exhibits because of the cosponsorship? What about financial liabilities? Program participation? Use of mailing lists? The answers to such questions should be confirmed in letters of agreement well in advance to alleviate possible misunderstandings and to enable cosponsors to participate in planning from the outset.

If other societies, organizations, or institutions will participate, cooperate, or assist with the conference, similar letters of agreement must be obtained to specify the nature of the involvement. As used here, participation implies that the society will be directly involved in the organization of the technical program and will assist with publicity and encourage members to submit papers and attend the conference. Cooperation implies that the society will assist with publicity and encourage members to submit papers and attend the conference [7].

All such letters should be secured well in advance of the conference so that cosponsors can be shown on the conference letterhead, and cosponsoring, participating, and cooperating organizations can be listed in the call for papers and in other conference publicity.

SELECTING KEY CONFERENCE OFFICERS

The third step in the process of planning and organizing a professional society's annual conference is to select the key conference officers: the conference manager (if there is to be one) and the conference chairperson. Typically, these decisions are made by a combination of society officers, the society executive committee, and the long-range conference planning committee. If the conference is to be jointly sponsored, representatives of the cosponsoring society may also be involved in making these decisions.

Selecting a Conference Manager

An important planning decision concerns conference management. Who will be responsible for making the conference arrangements with the hotel (or other host site), handling advance registrations and staffing the registration, information, audiovisual, and press offices during the conference? These tasks can be handled by a professional convention bureau, a professional conference manager, a local or conference-arrangements committee composed of professional society members who live in the host city, or members of a local chapter or area university. Society tradition and funds available for professional services are the determining factors in this decision. Conference arrangements must be handled by knowledgeable, skillful, willing personnel who are capable of negotiating to make the best possible arrangements for the society at the lowest equitable cost. Prior experience in dealing with hotel managers is a decided plus.

Contracting for the services of an experienced professional conference manager can benefit a society because such an individual brings knowledge of logistics and expertise in negotiation to the task. Conference arrangements can be costly if a trial-and-error approach is used. The conference manager can provide valuable planning suggestions, aid in site selection, obtain favorable hotel rates, and often negotiate special transportation rates for members.

The person chosen as a conference manager should be an experienced meeting planner with a proven record of producing high-quality, well-run conferences. The individual should have excellent communication and management skills; rapport with others; the ability to work with society officers, the conference and program chairpersons, the local and conference arrangements committees, and the hotel management and staff; the ability to complete tasks on time; and a commitment to making the best arrangements possible for the society. The individual should be bondable and should have a knowledgeable and efficient staff to handle audiovisual equipment arrangements and registration.

When a conference manager is selected, it is important to carefully delineate the area of responsibility and to establish the amount of time, and the fees to be charged for the specific services to be provided.

Selecting the Conference Chairperson

A critical planning decision concerns selection of a conference chairperson. This should be an established, widely known, and respected individual with longtime stature in the discipline; familiarity with the conference format and goals; demonstrated ability for leadership; a reputation for accomplishing tasks on time (a frequent problem area); management acumen; rapport with others; ability to work with professional and nonprofessional staff members (paid and volunteer); skill in interpersonal relations; and expertise in delegating authority, coordinating activities, and following up on details. Further, the individual should have an expressed interest in chairing the conference, sufficient available time, access to secretarial resources, and a commitment to making the conference a success. During the year before the conference, the chairperson must give conference work the highest priority and be readily available to coordinate others and participate in conference decisionmaking. Finally, the conference chairperson must have de-



Fig. 2. Representative structure for the conference organization.

cision-making authority within policy guidelines of the organization.

ORGANIZING THE CONFERENCE COMMITTEES

The fourth major step in the process of planning and organizing a professional society's annual conference is to organize conference committees and form the conference planning committee. That committee defines responsibilities, guides activities of the working committees, and serves as the policy making body for the conference [8]. Early organization of a competent planning committee by the conference chairperson is an essential step for the successful conduct of a conference [7]. It is done by determining what working committees are needed and selecting appropriate chairpersons. Typically, these chairpersons, with members of the society's executive committee, serve as the conference planning committee. Some members who have served on the planning committee previously should be included to assure continuity among the conferences.

Determining the Conference Committees

Representative conference committees are shown in Fig. 2; their responsibilities have been described elsewhere [5, 7, 8]. The need for and functions of conference committees are determined by the scope of the conference activities and the structure of the conference management.

Selecting the Committee Chairpersons

In choosing individuals to chair conference committees, the conference chairperson should select persons with stature in the society's discipline, familiarity with the conference format, demonstrated leadership ability, a reputation for accomplishing tasks on time, and expertise and interest in the area of responsibility of the particular committee. Skillful selection of the chairpersons for the individual committees, clear designation of the area of responsibility of each, delegation of authority to the respective chairpersons, and careful follow-through are essential for a successful conference.

• Program

The role of the program chairperson is to provide guidance to session chairpersons to help them create successful sessions, thus successful conferences. The program chairperson should be an established and respected professional in the discipline who can enlist top-level experts in the various subject areas to serve as committee members and to chair technical sessions. The program chairperson should know the state of the profession and the stature of those in it, both nationally and internationally, and should be willing to solicit suggestions and contributions. He or she should be able to evaluate proposed sessions and papers critically and should also be an innovator, willing to adopt new program formats that might improve communication in program sessions and the interaction of members in informal discussion groups [5]. The program chairperson should also have access to secretarial resources so paperwork can be handled on a timely basis.



Local Arrangements

The chairperson of the local arrangements committee should be a professional in the discipline, should live in the conference city, and should be thoroughly familiar with local points of interest, facilities, institutions, and laboratories [5]. He or she must also be aware of budget constraints affecting local arrangements and costs.

Conference Arrangements

If conference arrangements (hotel accommodations, registration, audiovisual, and the like) are to be handled by a separate committee, the person in charge should be thoroughly familiar with conference management and be able to negotiate with the hotel to make the best possible arrangements for the society at the lowest equitable cost and the greatest benefit to members.

• Spouses' or Family Program

If a spouses' or family program is planned for husbands, wives, or children of the conference attendees, the person in charge should be an innovative, outgoing person [6] familiar not only with the points of interest in the conference city and surrounding area but also with the profile of society members and their general interests and preferences for tours, social events, and daily schedules.

• Gifts/Industry Liaison

If a committee is to be established to solicit gifts from industrial sponsors and foundations, the chairperson should be an individual with stature in the profession, extensive contacts in industry, and, if possible, demonstrated ability to obtain outside funding.

• Exhibits

If exhibits are to be a part of the conference, the person in charge should be thoroughly familiar with the breadth of the technical field from which exhibits will be solicited; able to select exhibits that clearly pertain to scientific, educational, literary, or technical aspects of the society's discipline; and able to attract exhibitors and manage contractual arrangements.

• Finance

The chairperson of the finance committee (conference treasurer) must be capable of helping develop financial policies and a detailed budget for the conference, seeing that the conference operates within the approved budget, disbursing funds as needed, keeping detailed records of expenditures, and preparing financial reports.

Publicity

The publicity chairperson should have public relations expertise to facilitate selection of publicity media and mailing lists that will ensure extensive, effective coverage of the conference.

Publications

The publications chairperson should have expertise in writing, editing, designing, and managing publications and, if a conference proceedings is planned, the chairperson should be an experienced scientific or technical editor [10]. He or she must be able to work well with the staff of the printer as well as with the conference and program chairpersons and members of the conference planning committee. The individual should also have expertise in negotiating with publishers to obtain high quality work at a reasonable cost.

SELECTING THE CONFERENCE SITE, HOTEL, AND DATES

Part of a society's long-range conference planning should include consideration of future sites and the feasibility of the choices, as well as selection of tentative sites. Popular hotels in major cities are often booked ten years in advance and unless plans are made very early, the most favorable arrangements and dates may be unavailable. The conference site, hotel, and dates can be chosen by the society's longrange conference planning committee as part of the preliminary analysis and planning phase described earlier or, at this stage of the process, by either the conference planning or a site selection committee in conjunction with society officers.

Selecting the Conference Site

In evaluating proposals for a conference site, several factors must be considered. First, for most national (or international) conferences, the meeting site-a major hotel, resort, motel, or conference center-should be in a popular major city easily accessible by international air service. Often it is much less expensive for individuals to fly to a major city and attend a meeting in a more expensive hotel than to arrange transportation to a smaller city where hotel costs are lower. It can be helpful to prepare a matrix of airline costs from different points in the U.S. and abroad to the proposed conference sites and to consider the trade-offs of the sites and conference hotels from the point of view of the travel logistics and the possible costs of attendees' travel. Colleges or universities in or near major cities can also be considered as potential conference sites [6, 11]. Some have conference centers. Many offer attractive features, although accommodations may be spartan [11].

Second, in selecting a meeting site, the attractions of the local area should also be considered. They can be a factor in obtaining high quality speakers and a large number of at-



tendees. Will the meeting be held at a time of year when attendees will combine their trip to the conference with a vacation for their families? Will the attractions of the area encourage them to do so? On the other hand, a wealth of competing attractions may cause low attendance in technical sessions.

Third, the availability of a local chapter with members who are willing to aid in planning and arranging the conference should be considered.

Other considerations include the climate of the area and the character of the city [6]. Is the nature of the city changing? Will it be a desirable place for a meeting three years, or five years, or ten years hence when the conference will actually be held?

Conference sites can be selected in alternate regions in alternate years (e.g., alternating east and west coasts, or alternating east, west, midwest, and south-central locations); in a single location every year; in response to proposals received from local chapter sponsors; according to the society's regional membership distribution; or on the basis of the long-range conference planning committee's feasibility studies and suggested sites. Where members *want* to meet should also be considered [6], although this may not be where they will in fact go.

Selecting the Conference Hotel

The conference hotel (resort, motel, or conference center) should be high quality and in a relatively safe environment. The physical facility contributes to the atmosphere of the conference [12]; it sets a mental mood, either positive or negative [13]. A conference attendee's first impression is based on the appearance and attributes of the conference site and his or her initial contacts with the staff. An attractive facility and a personable staff help evoke a favorable image of the conference and of the society. An unpleasant experience stays in memory a long time.

The facility should provide attractive guest accommoda-

tions; attractively appointed meeting rooms in sufficient number and of adequate size with appropriate furnishings for the types of sessions planned (e.g., lectures, discussion sessions, roundtables, workshops, and tutorials); appropriate heating, air conditioning, and room ventilation; a sufficient number and adequate mix of fast-food, moderately priced, and expensive restaurants; adequate recreational facilities; adequate parking facilities; available sundries and supplies; access to medical assistance and to transportation; and a competent, proven, courteous, service-oriented, flexible staff.

While some of these factors are seemingly immeasurable in advance of the conference, visits to proposed sites and careful evaluation of the facilities, the quality of the food service, the capabilities and attitudes of the staff, and the overall operating procedures help to provide a fair assessment of the quality of the facility.



As an aid to evaluating tentative sites, it is helpful to establish a checklist or survey form [12] so that specific information about each site can be recorded and the features of each facility rated for comparison with others. Elements can be evaluated using a rating system of Excellent, Satisfactory, and Unsatisfactory; a Likert scale (e.g., 5 = excellent; 4 = above average; 3 = satisfactory; 2 = marginal; and 1 = unsatisfactory); or a numeric scale of 1 to 10. Major items to be considered in such an evaluation are listed in Table I.

Selecting the Conference Dates

The dates chosen for the meeting should not conflict with those of other major meetings on the same or a related subject, with those of the meetings of other large organizations, or with those of major national or religious holidays [6]. Scheduling conferences to begin on Monday or end on Friday can be advantageous because participants can travel on the weekend if they desire, come early or stay late to enjoy the attractions of the host city, or spend the weekends at home. On the other hand, scheduling the conference over a weekend can provide cost advantages. For example, some major hotels give a rate reduction if the meeting is scheduled on a weekend; some airlines offer special fares during weekends. When scheduling conference dates, it is also important to provide for the business meetings that must be held in conjunction with the conference. The schedule should be set so that advisory and executive committee meetings can be held conveniently, perhaps on a day preceding or following the conference. This can be an important choice, depending upon circumstances. Such meeting dates should be announced to society officers well in advance.

It is helpful to select a target date and two alternatives, and then to determine that they are not in conflict or in competition. This can be done by

- Checking the calendar for major national holidays, local and regional observances, and the religious holidays of the participants [12]
- Contacting the visitors and convention bureau and major hotels in the projected host city to see that no conflicting major conference is scheduled for the same time in other hotels in the city
- Telephoning the presidents or conference managers of other organizations with similar interests to see that none has already scheduled a conference for the same time. The dates should be neither in direct conflict nor close to those of competing organizations [6].

When the chosen date has been found free of conflicts, it should be booked with the hotel at once. Hotel personnel may change between the making of preliminary and final arrangements, so agreement should be confirmed in writing [5]. Written announcements of the conference days should then be sent without delay to all of the possible competing organizations and to the members of the society so that potential future competition can be stayed [6].

Summary

In selecting a conference site and meeting dates, remember that the further in advance a meeting is scheduled, the less likely it is that there will be competition from others. When site selection is delayed, it is difficult to obtain good hotels in interesting cities, the most favorable dates, and the most desirable facilities.

DEVELOPING THE CONFERENCE MASTER PLAN

The fifth major step in the process of planning and organizing a professional society's annual conference is developing a master plan. This involves the combined efforts of the conference chairperson, the conference planning committee, the conference manager, the society executive committee, and society officers. Decisions made require the approval of society officers and the society executive committee. This step consists of (1) establishing a planning time-table; (2) assessing meeting objectives and developing a method of approach; (3) selecting the conference theme; (4) determining the approach to the technical and social programs; (5) planning for student involvement in the conference; (6) establishing policies and guidelines for gifts and Items to be Considered in Evaluating Potential Sites for an Annual Conference*

Sleeping Accommodations

- Single

- Double

- Twin

- Suite

Room size

Cleanliness

Bed comfort

• Desk, desk light

Table, chairs

Closet space

facilities

Noise insulation

· Room rates

- Single

- Double

- Twin

- Suite

Discounts

Meal events

Menu variety

Special diets

gratuity)

- Breakfast

Lunch

- Dinner

Break setups

— Juice

- Fruit

- Meals

Policies

- Breaks

- Receptions

Hotel reservations

materials

schedule

Restrictions

- Exhibits

Billing

- Coffee, tea

- Soft drinks

Ice cream

Check-out time

Complimentary room policy

Dining room/banquet room seating

Cost for meal events (meal + tax +

Days advance guarantee

· Minimum meal guarantee

- Cheese and crackers

Conference arrangements

· Early meeting-room setup

Advance shipment of conference

· Preparation of conference master

Audiovisual equipment

- Hospitality rooms

Days advance notice

· Bath

• Number of rooms available

Attractiveness of furnishings

Proximity to meeting rooms and dining

Location

- Access to facility
 - Air
 - Auto
 - Limousine
 - Helicopter shuttle
- Links with local transportation
- Cost

General features

- Number of guest rooms
- Layout of facility
- Age of facility

Facilities and services

- Food and beverage services
 - Cocktail lounge
 - Coffee shop
 - Snack bar
 - Dining room
 - Restaurant
 Other
- Parking
- Parking
- Availability and cost
- Capacity
- Covered or open
- Safety and security
- Personal services
 - Barber shop
 - Beauty salon
 - Boutiques and clothing stores
 - Flower shop
 - Gift shop
 - Medical assistance
 - News stand
 - Speciality shops
 - Sundries and supplies
- Recreational facilities
 - Sauna
 - Swimming pool (indoor/outdoor)
 - Tennis courts (indoor/outdoor)
 - Track (indoor/outdoor)
- Other
- Travel
 - Airline reservation desks
 - Rental car agencies
 - Travel agency

Meeting rooms

- General accessibility
- Accessibility to handicapped persons
- Size and shape of rooms
- Seating capacity
- General appearance
- Aesthetics (impact of color, decor, space)
- Freedom from obstructions such as columns or pillars
- Lighting
- Acoustics
- Entrances and exits
- Location of doors and windows

- Capability of darkening room
- · Heating/air conditioning/ventilation
 - Adequacy
- Location of controls
- Location of electrical outlets
- Location of PA system controls
- Location of lighting controls
- Room arrangements
- Flexibility
- Stability
- Proximity to
- Elevators
- Dining and sleeping rooms
- Kitchens
- Construction or heavy traffic areas

- Restrooms

- Meeting facilities
- Accessibility
- · Availability of extra meeting rooms
- Registration area
- Storage space
- · Hospitality rooms/suites
- Facilities for receptions and social gatherings
- Exhibit space
 - Availability
 - Capacity
 - Setup and takedown times
 - Personnel
- Cost
- Restrooms (location and size)

Equipment

- Bulletin boards
- Tables (number, size, shape)
- · Chairs (number, styles, comfort)

· Office machines for registration area

Audio tape recorders and cassettes

· Video tape recorders and cassettes

· Microphones and PA system

- Lecterns
- · Projector stands/tables

Audiovisual equipment[†]

- Screens
- · Chalkboards, chalk, erasers
- Easels

Projectors

Flannel boards

- Filmstrip

— Movie

— Slide

- Opaque

- Overhead

Light pointers

· Record players

Extension cords

Duplicating facilities

· Resources available

· Lead time needed

*Check cost, availability, equipment condition, and personnel restrictions if these items are furnished by the facility.

Cost

*Reference: This, L. E. The Small Meeting Planner. Houston, TX: Gulf Publishing Company; 1979.

exhibits; (7) setting audiovisual equipment policy; (8) planning conference publicity and publications; and (9) preparing a tentative budget (determining sources of funding and projecting costs). The master plan should be developed in a planning meeting held well in advance of the conference (1½ years or more; see the representative timetable in Table II). If convenient, the planning meeting can be held as part of a visit to the conference site.

Establishing a Planning Timetable

To coordinate work and to ensure that planning meetings are held, publications issued, speakers selected, and conference arrangements made in good order, a master timetable listing the major tasks and the dates for completing them should be developed. A tentative schedule should be prepared in advance of the first planning meeting, then completed as planning decisions are made at that meeting. When completed, the schedule should be sent to the conference manager, the society executive committee, society officers, and all conference committee chairpersons.

When setting deadlines, it is helpful to work backward from the opening day of the conference, the major target date. There should be two other major focal points: first, the deadline date for preparation of the call for papers, by which time major decisions must have been made about conference format (including theme and approach), publications, and audiovisual equipment; and second, the deadline date for submission of abstracts or full papers for review, which affects the dates for reviewing and selecting papers to be presented, notifying authors, preparing the final program, and preparing the conference abstracts and proceedings for publication [5]. Once the major deadlines are set, the deadlines for individual publications should be established.

In preparing the master schedule, all activities must be listed and reasonable amounts of time allocated for accomplishing them. The final schedule must be coordinated with the schedules of typesetters and printers, the conference manager, and the hotel. It should include not only tasks and deadlines but also the committees and individuals responsible for them. An even more detailed schedule may be appropriate; some find a week-to-week set of specific tasks helpful for keeping on schedule.

Assessing Meeting Objectives and Developing a Method of Approach

Typically, long-range planning will have been done by society officers, the society executive committee, and the long-range conference planning committee. Certain decisions will have been made about the general purpose, duration, and management of the conference, and the location and dates of the meeting will have been set. The first task of the conference chairperson and the planning committee is to learn what arrangements have been made and to establish a plan of action based on them.

Here the task is one of formulating an approach so that

participants and attendees are attracted to the meeting and the objectives of the conference are met. The conference chairperson should build upon precedents and the experiences of those who have chaired the conference in previous years when establishing a plan of approach for the meeting.

Selecting the Conference Theme

The conference theme is the focal point for the technical program and serves to integrate the various subject areas of the conference into a coherent whole. The theme should suggest the purpose of the conference, indicate the subject matter of the meeting, be acceptable to all who might be expected to attend, and move individuals to action [6].

To determine the theme, it is helpful to brainstorm—to think of all the possible topics that might be developed, to consider the current topics of greatest interest to those in the discipline, to consider current topics that will have the greatest impact on professionals in the discipline, and to identify the one subject that might be of most interest and concern to the profession during the conference year. That topic, when appropriately phrased, should be the conference theme. A comprehensive, catchy phrase helps to make the theme memorable.

If the name of the conference serves as the general theme and is the same from year to year, planning might center on developing a slogan, catchy phrase, or series of phrases related to the conference city for use in publicity to attract attention to each particular conference and to motivate members to attend.

Once the theme or slogan is determined, the major topic areas in which presentations are desired must be listed. These can again be developed through brainstorming or through a questionnaire to the members and attendees at each conference. Some topic areas may be the same from year to year but interest areas can be modified to reflect new "hot issues" and to carry out each year's conference theme.

Determining the Approach to the Technical and Social Programs

The overall approach to the technical program must be determined next: whether to include tutorials, lectures, and roundtables as well as panels of papers and whether to develop a program of strictly invited papers, to plan a program of contributed papers, or to strive for a mix. The technical program is the heart of the conference [7, 8] and special care must be given to obtaining papers of high quality. Structuring a program of all or mostly all papers invited from recognized authorities provides for a high quality technical program but makes for a closed conference. Attendance at a conference of invited papers may be smaller if the majority of possible attendees must present papers in order to receive travel funds.

Structuring a program of all contributed papers makes for a more open conference but organizing sessions may prove

	Table	e II		
Typical Planning	Timetable	for an	Annual	Conference

Time Before Conference 5 to 10 years or more	Planning Action		Prepare author's kits and have them printed. Prepare control forms and determine procedures for office record keeping, management of requests for information, and safekeeping of submitted ma- terials. Identify journals to be used for major conference publicity and determine lead time for copy. Make arrangements with the program chairperson of the next year's conference for a display in the exhibits area, in the registration area, or in both. Plan to include the call for papers, a brochure about the conference site, and information about society membership. Obtain information from the visitors and conven- tion bureau of the next host city so that publicity can
2 years	Obtain agreement in writing of cosponsoring, participating, and cooperating organizations. Appoint conference manager. Select conference and program chairpersons.	l year	be planned and an exhibit designed for display. Hold conference planning committee meeting during the current conference. Also meet with the
1 1 years	Organize conference committees. Visit conference sites and assess facilities. Select conference location, hotel, and dates if not already selected. Develop timetable for conference planning meet- ings, preparations, and publications. Hold major planning meeting, possibly at con- ference site. Select conference name and theme or slogan; identify major interest areas for technical program. Develop budget of projected income and esti- mated costs. Design conference logo; print letterhead and en- velopes. Plan and begin solicitation of industry and founda- tion contributions and sponsorship of social or special events. Make final decisions on details to be announced		current or outgoing conference chairperson and planning committee to obtain insight and per- spective about planning and organization and about unique, unanticipated problems that have been en- countered. <i>Note:</i> A follow-up meeting or conference call a month or two later is advisable to check on any late-showing problems. Distribute the call for papers at the current confer- ence, along with a brochure about the next host city. Issue invitations to potential session chairpersons and speakers during the current conference. Ac- tively seek program participants. After the current conference, mail calls for papers to members and potential participants using appro- priate mailing lists. Issue invitations to session chairpersons and speakers if not already invited. Prepare and mail information and application forms to prospective exhibitors.
	 in the call for papers: Decide on type of author contributions (abstracts or full papers; length; method of preparation; method of submission for review; method of printing). Determine type of audiovisual equipment to be provided and participations on spacially ordered. 	11 months	Follow up with letter to invited session chair- persons and speakers as a reminder of responsibili- tics and due dates. Issue invitations to alternate chairpersons and speakers if necessitated by refusals or cancellations.
	 provided and restrictions on specially ordered equipment. Set deadlines for Receipt of abstracts or papers. Notification of authors of acceptance. Negotiate publication costs and arrange publication schedule with printers for all conference materials: stationery, calls for papers, author's kits, brochures, program, collected abstracts, proceedings, addenda, etc. Obtain mailing lists and mailing labels. Prepare calls for papers and first conference announcements and have them printed. 	10 months	Receive list of invited speakers and their topics from session chairpersons; send author's kit to each. Make final hotel arrangements and arrange or negotiate and contract for all major services during conference: audiovisual equipment, projectionists, transportation for special events, breaks, large food functions, special equipment in meeting rooms, registration personnel, session monitors. Identify tasks to be handled by local arrangements committee, professional society member volunteers, and student assistants. Make arrangements for tours and special events.

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7 or 6 months	 Make final decisions on details to be included in registration form and in conference publicity: Establish registration fees, and what periods, activities, and publications they will cover. Establish prices of publications, meals, socials, and special events not covered by registration form. 		and put it into final form for the typesetter and printer. Mail advance programs and registration informa- tion to members. Send publicity about program to society-publica- tion editors (journal, magazine, newsletter) for in- clusion in their next issues.
	 fees. Confirm hotel room rates and reservation procedures. Set deadlines for Advance registration Hotel reservations Ticket purchases for tours and special events Cancellations (and return of all or part of the advance registration fee). This may be the <i>deadline for receipt of abstracts</i> or papers for review. (The deadline will vary depending on whether authors are to submit full papers for review and selection or will submit full papers 	3 months	Mail final announcement of program to regis- trants if more than one brochure is included in the series. Print tickets and badges; order directional signs for conference registration area, meeting rooms, technical sessions, special events, hospitality rooms and suites, etc; order registration supplies. Send press releases about the conference to news media and trade magazines. Check proofs of conference proceedings and have it printed.
	after an abstract has been accepted.) Acknowledge receipt of invited and contributed abstracts or papers as they arrive. Distribute materials to program committee for their review and selection for presentation at the conference and publication in the conference pro-	2 months	Print final publicity in society publications. Note. In most cases, material to be printed must be sub- mitted well in advance of this date. Prepare registration packets for advance regis- trants.
$\frac{1}{5 \frac{1}{2} \text{ to}}$	Make final selection of papers for presentation and publication in the conference proceedings as	2 or 1 month	Send master schedule and full setup instructions to hotel and suppliers and to chairpersons of con- ference committees. Begin local publicity about conference.
months	recommended by the program committee. Notify contributors of acceptance or rejection. Return rejected papers.	l month	Closing date for advance registration.
5 months	Schedule technical sessions, plenary sessions, socials, special events, and business meetings. Pre- pare detailed preliminary conference program list- ing titles, chairpersons, and speakers for technical sessions, tutorials, and workshops; business meet- ings; socials; and special events. Show meeting time and room location for each event. Prepare technical program matrix.	3 to 2 weeks	Ship copies of final program and conference proceedings to hotel or local arrangements chair- person for distribution at the conference. Items should be shipped so that they will arrive two weeks before the start of the conference or as designated by the hotel; some will not accept materials this far in advance. Ship registration area supplies and directional signs to hotel.
	Distribute the draft of the program to society officers, conference planning committee, and pro- gram committee for review.	l wcek	Obtain maps and brochures for area attractions from the local visitors and convention bureau.
	Finalize program details. Prepare program high- lights brochure and mail to members. Publish con- ference announcement and technical program matrix in society publications (newsletter, magazine, journal). Prepare program and have it printed. Notify each session, workshop, and tutorial leader	l day	Set up registration area and information desk. Set up exhibits area. Prepare errata or program addenda and have it reproduced for distribution at the conference. Make final checks of all conference arrange- ments.
	of the time and location of the session through an advance copy of the program listing for the session. Provide names, institutions, and titles for authors who have been assigned to each session and a copy of the paper or abstract.	During the conference	Double-check arrangements. Oversee registration process and running of technical sessions, socials, business meetings, and special events. Handle requests, problems, and contingencies.
4 months	Notify authors of their placement on the program, either directly or through the session chairpersons. Deadline for receipt of full papers (if prepared) after the abstract is accepted for presentation). Assemble material for the conference proceedings	After the conference	Prepare preliminary conference report on at- tendance, revenues, costs, and publications inven- tory. Send thank-you letters to invited speakers and session chairpersons, plenary-session speakers,

	conference manager, and hotel conference coordina-	2 to 3	Make a final accounting after all bills have been
	tor and staff, as appropriate.	months	paid.
] month	Publish a report to the members in the society newsletter or magazine. Include information about the availability of proceedings.		Prepare final report for the society, including the audit of financial records and distribution of re- maining funds. Provide notes, records, and suggestions to the chairperson of the next year's conference.

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difficult, the quality of the technical program may be highly variable, and it may be difficult to obtain enough papers. Often the best solution is a combination of invited and contributed papers, with a significant proportion of papers invited by session chairpersons who are leading authorities in the discipline.

Decisions should also be made about including poster sessions, special workshops, and short courses. Workshops and short courses can be provided as a service to members at no additional charge—a supplement to strengthen the technical program—or they can be included as a corollary to the technical program at a modest or a good charge to members and as a source of revenue to the society. Workshops and short courses can be scheduled on the day before or the day after the conference so that they do not diminish attendance at regular technical sessions. Workshops can also be scheduled in the evenings. Poster sessions can be scheduled for break times and held in the exhibits area, when exhibits are included, or they can run in parallel with other sessions. They must be in areas of high traffic to give the exposure necessary for successful sessions.

The scheduling constraint for workshops and poster sessions is usually the number of announced conference days and the events available to fill those days. The program should be arranged so that a person does not have to be in two places at once to meet his or her interests.

Other decisions involve planning for special meals (luncheons or banquets), one or more plenary sessions with a keynote speaker, socials, and special tours. Meal events are costly and are not always well attended, especially formal banquets. An alternative to the formal banquet is a conference reception, which can be held as a welcoming event on the evening before the conference opens, on the first afternoon, or as a closing session; it can include presentations or serve only as a social gathering. If a late afternoon conference reception is included, it can be held in the exhibits area as a formal opening for the exhibits—an effective way to attract participants to the area. Such a reception can follow a combination plenary session and business meeting. Special receptions or socials can also be held: a welcoming reception for new members or first-time conference attendees; a president's reception; a conference chairperson's reception; or a program chairperson's reception or social for session chairpersons, speakers, conference planning committee members, and society officers to welcome participants, to enable them to become acquainted with other participants and with society officers, and to go over any final arrangements. Socials, when properly planned and held in the correct environment, are especially valuable in promoting working relationships among participants.

When plenary sessions include keynote speakers, provisions should be made for selecting and inviting the speaker well in advance. Normally, distinguished individuals in the discipline are chosen as plenary session speakers, and since such individuals generally have extraordinarily full schedules, they must be invited one or two years in advance [5, 8]. Including their presentations in the advance publicity and programs is advantageous. Planning for alternative speakers, even if informally, can also be important should a plenary session speaker be forced to cancel. Similar guidelines apply to selection of keynote speakers for luncheons and banquets.

Part of the program planning must concern whether to include a spouses' or family program in conjunction with the conference and whether to include sightseeing or professional tours. If spouses and families are encouraged to attend, a program should be arranged for them.

Traditionally, spouses' programs have been arranged for women [6]; however, increasingly, spouses attending professional society conferences include both men and women. Program planners should include events that appeal to both men and women, particularly if the profile of society members suggests that men would participate in a spouses' program.

Several types of activities can be included in a spouses' program. Among them are tours of plants or laboratories related to the society's discipline and planned outings to major sightseeing or recreational attractions in the area, museums and art galleries, cultural events (concerts, plays, musicals), historical sites, specialty restaurants (for luncheons and dinners), professional sports events (e.g., major league baseball, football, or basketball, depending on the season, or golf or tennis tournaments), and malls. Participatory sports events can also be planned as a part of the program. Ingenuity in selecting events and arrangement of an innovative program with both educational and recreational appeal are necessary for a successful spouses' program.

When a conference includes a spouses' program, arrange-

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ments should be made for a hospitality room to serve as a meeting place and a departure point for events. Provisions should be made for refreshments in the hospitality room. Area maps, brochures of local attractions, lists of restaurants, and sample menus can also be provided.

Planning for Student Involvement in the Conference

If the society has student members, part of conference planning may concern ways to involve students in the conference program and encourage them to attend the conference. A student paper contest might be held and a winners' session included as part of the technical program. Students might also be encouraged to contribute papers or proposals on a competitive basis for one or more special student sessions. A discount for advance registration might be offered. Students in the local area might receive complimentary conference registration in exchange for serving as session monitors or projectionists for a fixed number of sessions.

Establishing Policies and Guidelines for Gifts and Exhibits

At this stage of planning, specific decisions should be made about soliciting industry gifts, either as grants or as sponsorship of breaks or social events. If gifts will be sought, guidelines and procedures should be established so that a committee can be formed and potential contributors contacted.

A decision should also be made about exhibits. If exhibits will be included, the type of exhibits must be determined and selection criteria established for both exhibits and exhibitors. A committee must be formed to handle the arrangements with the hotel for exhibit space, the layout of the display area, the promotion and sale of exhibit booths, and communication with exhibitors. Procedures for handling exhibits must be established, any restrictions on displays determined, fees set for the sale of exhibit space, and a prospectus prepared for distribution to potential exhibitors. The guidelines set for handling exhibits must conform to society policy.

The advantages and disadvantages of including exhibits have been discussed elsewhere [6], as have the procedures for handling and promoting them [5–8]. Exhibits add a commercial dimension to a conference, yet they are a source of revenue for the society and can benefit members by bringing them up to date on technological advances [5, 6]. If exhibits are to be included, they should be integrated with the technical program and should complement and enhance it by displaying new products and services, new techniques and equipment, and applicable publications [7, 8].

Setting Audiovisual Equipment Policy

Next, decisions must be made about providing audiovisual equipment and about a policy for charging authors for special equipment or last-minute requests. It might be agreed to provide one 35-mm projector for each session and to allow other equipment only by special request, the author



either paying the full expense or sharing it with the society. Without restrictions and provisions for charging authors, the cost of renting special equipment may be excessive.

Planning Conference Publicity and Publications

Decisions must also be made about publicity and publications. The success of the annual conference depends in part upon a well organized publicity campaign and upon distinctive, timely, accurate conference publications. These are needed to announce the meeting, to attract participants, and to provide a permanent record. Although the extent of the publicity campaign and the number and type of publications, the content, the design, and the production are determined largely by cost and available funds, the publicity campaign should be as widespread as possible, for it is difficult to oversell a conference [11].

Among the useful publicity media and publications are the following:

- Brief announcements in the professional literature to show date, place, theme, and individual to contact for information. A clip-out and send-in form is very effective.
- Brief announcements in the newsletters of other societies that list future conferences on topics of interest to their members
- Information brochure to serve as an advance or preliminary announcement
- Call for papers to announce the conference and solicit contribution of papers, workshops, and tutorials. A call for papers for the next year's conference should be available for registrants to pick up at the conference each year, then mailed to society members immediately after

the conference. Including a clip-out and send-in form as part of the call is very effective if contributors must request an author kit before submitting an abstract or a paper.

- Exhibits prospectus
- Full-page announcements or advertisements in each issue of the society newsletter, magazine, or journal during the year before the conference
- News articles in the society newsletter or journal and sent to associated technical newsletters or journals and to trade journals
- Press releases (to other societies, trade journals, and the press)
- Program
 - -Preliminary

—Final

- Program highlights brochure
- Collected descriptive abstracts (for publication in the society journal)
- Letters to members and to previous year's participants about the conference
- Conference newsletter (sent as one of publicity mailings to members; used as program highlights and addendum on first conference day; published each day of conference as a daily program highlights newspaper)
- Author's kit
- Proceedings
 - -Abstracts prepared for distribution at meeting
 - -Full papers prepared for distribution at meeting
 - -Full papers or conference reports prepared and published after the meeting
- —Transcripts of oral presentations and discussion sessions (published and mailed after the meeting)
- Registration packet or kit consisting of a specially designed envelope, portfolio, or briefcase, and specially designed notebooks and pens in addition to standard conference materials (program, proceedings, and badge)
- Directory or list of conference attendees
- Addenda or program errata (for distribution at the meeting)

At the very minimum, the following publications are needed to announce, publicize, support, and record an annual conference:

- Brief announcements in the professional literature
- · Call for papers or descriptive conference brochure
- Announcements (advertisements) in the society newsletter and journal
- Author's kit
- Final conference program
- Collected descriptive abstracts
- Conference proceedings
- Simple registration packet
- Addenda or program errata

The more publications and the more mailings the budget permits, the better coverage the conference will receive and the greater the likelihood of a large attendance. Repeated mailings are more effective than a single, expensive campaign, for it is repetition that sells an idea [6] and motivates members to attend and participate.

When planning publications, decisions must be made whether to print both a preliminary and a final program and whether to print a program highlights brochure or conference newsletter as well. Among the options are (1) mailing both a preliminary and a final program to advertise the conference; (2) mailing a brochure containing conference highlights and a preliminary technical program matrix (a highly condensed version of the program, including session titles, session chairpersons, and speakers; and social and plenary sessions, all with dates, times, and meeting rooms); and (3) publishing and mailing a conference newsletter with program highlights, a description of the conference city and its attractions, a listing of tours and special events, and information on registration and hotel reservation procedures, followed by a final program.

The decision is determined in large part by number of pages, number of copies, mailing costs, and available dollars. A related decision concerns whether to mail items first class or in bulk. A first-class mailing is more distinctive and more timely but is considerably more expensive than a bulk mailing. A minimum of 200 items is required for bulk mailings and the weight of the item to be sent is a major cost factor. Also, bulk mail receives a low priority; it takes three to four weeks to bulk-mail items from the east to the west coast of the U.S., so that considerable lead time must be included in the publication deadlines. If several mailings are to be done, both methods can be used, with early items sent by bulk mail and later ones by first class. The number of items to be sent abroad must also be considered. International mailings are much more costly than domestic ones.

If the number of pages in the conference program is great, the program will be more expensive to print and mail than a short brochure or conference newsletter. If the program is short, however, the mailing costs may be the same for the program and the brochure, the only difference being the cost of printing. The value of the three types of publication to members and of their effectiveness in attracting conference attendees must be assessed and the publications decision made in part on that basis.

Another important publications decision concerns whether abstracts or full papers or both will be required for the conference and how the abstracts or papers will be prepared, submitted, and reviewed or refereed for acceptance. For high quality, abstracts and papers must present previously unpublished original work; invited as well as contributed abstracts or papers must be reviewed or refereed; and, ideally, provision must be made for editing and revising the manuscripts before final publication [10]. It is less expensive for the society and less time consuming for authors if abstracts alone are required (either 200-word or extended



abstracts of not more than 1,000 words), but full papers provide a more detailed record of conference activity and a more archival publication. Some feel that higher quality presentations and a higher quality overall technical program result when full papers are submitted and reviewed or refereed for selection for presentation and publication. Others believe that a valid decision can be made on the basis of a brief abstract. If the decision is made to have authors submit full papers, then the question of whether to restrict the length of the paper must also be considered.

Decisions must also be made about whether authors are to (1) submit abstracts for review and prepare full papers after acceptance; (3) submit full camera-ready papers which, review and editing, then prepare camera-ready copy after acceptance; (3) submit full camera-ready papers, which, after review, may be retyped by the authors or the conference staff or published exactly as they are initially received; or (4) submit extended abstracts in camera-ready form for publication in that form. Undoubtedly, proceedings of higher quality result when papers are edited, revised after review, and retyped before publication, but logistics and scheduling may be difficult if authors are asked to retype, or expensive if the conference staff is expected to do so.

A related decision is whether to supply oversized, bluelined manuscript mats so that abstracts and papers can be prepared for photoreduction or to have authors prepare originals on plain bond paper. The cost of preparing and mailing author's kits must be compared with the cost of printing a large number of actual-sized pages in the proceedings. Publishers who specialize in conference proceedings can provide valuable advice and can also assist with design of the manuscript mats and preparation of the accompanying style guide [10]. As a final part of planning for conference publications, if the budget permits, the planning committee should work with a graphic designer to develop a distinctive logo and a color scheme for all conference publications and publicity. The design can be keyed to the theme of the conference or to the conference city. The color scheme can reflect the society's colors or a color appropriate to the theme of the conference. The color should be used consistently for all conference publications and publicity from stationery, announcements, conference program, and proceedings to luncheon programs, conference badges, and registration packets.

Preparing a Tentative Budget: Determining Sources of Funding and Projecting Costs

The costs of running an annual conference are generally funded by a combination of sources:

- Contributions by the society from membership dues for start-up costs
- · Contributions by cosponsors
- Registration fees
- Sale of publications
- Sale of cassette tapes of technical sessions
- Special workshop and tutorial fees
- Short course registrations
- Industrial gifts
- Exhibit fees
- Donations of free time, materials, and facilities.

Publications costs may be partially offset by including advertising in the conference progam.

In preliminary planning, major revenue sources should be identified, the cost of the meeting projected, and a tentative budget prepared for approval by society officers and the society executive committee. A list of representative budget items is shown in Table III. When a tentative budget has been set, it is useful to project the number of meeting attendees needed to meet budget goals.

The tentative budget is finalized during the next stage when contracts are negotiated with the hotel, the publisher, and others who will provide services and when registration and event fees are set.

Throughout the year or more of conference planning, the chairperson, with the aid of the society secretary-treasurer and the conference finance committee, is responsible for running what may easily be a \$250,000 business, depending on the number of participants and attendees. Budget decisions must be made on the basis of sound advice, then adhered to strictly. Of special importance for staying within the budget are careful allocation and control of costs for publications, mailing, and audiovisual equipment, and strict adherence to deadlines to avoid extraneous costs in late charges. Of importance, too, is control of local arrangement costs, especially those for any special events the local arrangements committee may be sponsoring.

SOURCES OF REVENUE

Registration fees

- Society members
- Nonmembers
- Students
- Spouses

Professional society support

- Membership dues
- Cosponsors
- Contributions
- · Industrial gifts
- Grants
- Exhibits
- **Publication** sales
- Cassette tape sales
- Workshop fees Short course registrations
- Special event tickets
- Meal tickets

EXPENSES

Addressing and mailing Duplicating

Expendable supplies

- Stationery and envelopes
- Staplers, markers, pens, pencils, thumbtacks, tape, etc.
- Directional signs
- Badges and ribbons

Insurance

- Mailing lists and publicity
- Shipping (from printer to conference or
 - mailing site)

Telephone

- **Conference** operations
- Meeting rooms
- · Exhibit space
- · Audiovisual equipment
- Office machines
- Reproduction of materials at conference
- · Taping of sessions

Personnel

- Audiovisual staff (if volunteers are not available)
- · Conference manager
- · Registration staff
- Secretarial staff (to answer phone, handle special requests, provide problem-solving assistance)

Hospitality costs

- Breakfasts
- Luncheons
- Banquets
- Breaks
- Socials
- Receptions
- · Hospitality suites
- Hospitality program
- Spouses' program
- · Music or entertainment
- Flowers
- Press room
- **Publication** costs
- Logo
- · Calls for papers
- Announcements
- · Author's kits
- · Program highlights brochure
- Conference newsletter
- Program
- · Collected abstracts
- Proceedings
- Registration packet
- · Addenda or errata
- · Other publications
- **Out-of-pocket expenses**
- · Program committee
- Society officers
- **Travel** expenses
- · Society officers
- · Program committee
- · Conference staff
- · Plenary-session or banquet speakers



FOLLOWING THROUGH AND IMPLEMENTING PLANNING DECISIONS

When planning decisions have been made, the task is largely one of following through and implementing the arrangements. Once the master plan has been devised, the action starts, with each committee member responsible for his or her own assignment, the general conference chairperson offering guidance and promoting enthusiastic participation. The main tasks that must be completed in this stage of the management of a professional society's annual conference include (1) preparing publications and the publicity campaign; (2) selecting session chairpersons, workshop and tutorial leaders, and speakers; (3) establishing a management system for handling submitted papers, author correspondence, and requests for information; (4) making the final arrangements with the conference hotel; (5) arranging social programs and special events; (6) setting registration fees and deadlines; (7) finalizing the budget; (8) establishing the program (arranging technical sessions, socials, and special events); (9) coordinating conference arrangements; and (10) setting the stage for the next year's conference.

Preparing Publications and the Publicity Campaign

Generally, publications are planned and prepared jointly by the program chairperson and the publications and publicity committees. To be successful, publications must be well written, attractively designed, accurate, distinctive, and distributed throughout the conference year. Negotiation with the publisher is a critical step. Expert help is valuable to keep costs down and production quality high. Details for developing individual publications are given in the appendix.

Selecting Session Chairpersons, Workshop and Tutorial Leaders, and Speakers

After planning decisions have been made and while publi-

cations are being developed, the next step is to select session chairpersons, workshop and tutorial leaders, and speakers. Whether papers are invited or contributed, the quality of the technical program is enhanced by selecting experts to serve as session chairpersons and having them invite a substantial number of papers from other authorities in the discipline.

In choosing individuals to serve as session chairpersons and thus as members of the program committee, the program chairperson should actively recruit individuals who

- Are acknowledged authorities in the discipline
- Have the stature and ability to attract outstanding speakers
- Have management ability
- Have demonstrated ability to produce results by following through and completing tasks on time
- Have attended or participated in other conferences
- Desire to organize a session
- Will be available to participate in planning decisions throughout the year before the conference and will assign a high priority to planning a successful meeting.

Similar criteria should be applied in selecting people to offer workshops and tutorial sessions.

The program chairperson should have selected many, but not all, session chairpersons at the previous annual conference. To ensure new ideas and an open meeting, the conference chairperson should select some individuals (10-30 percent) who are relatively new to the society and have presented well; and others who are active but may not have attended the previous one or two conferences. A percentage of novices is desirable, too, to bring new blood into the group.

The role of the session chairperson is to interact with speakers to ensure quality sessions. Once session chairpersons have been chosen, considerable authority for developing the individual sessions should be delegated to them. Their task should be threefold: to invite a substantial number of papers from other experts in each topic area and ensure a core of excellence for the technical program; to review contributed papers and accept or reject them; and to determine the sequence of invited and contributed papers for the session. The quality of a technical program is enhanced by delegating authority for acceptance and rejection of papers to knowledgeable reviewers. Those experts can also help arrange papers in a sequence that is logical and meaningful. Such an approach avoids a common failing of many conferences where the selection and arrangement of papers for the technical program are made by an individual or committee not competent to judge the merits of papers in all areas within a discipline or specialty. The mix of invited and contributed papers results in a higher quality of technical programs over the years.

After session chairpersons tentatively agree to organize sessions, letters of confirmation should be sent within two weeks to affirm tentative session titles and the ground rules for chairing sessions and to provide the deadlines for submitting names of invited speakers. A letter of confirmation should also be sent to workshop and tutorial leaders. As a second follow-up one month later, a control form should be sent to session chairpersons with information about review procedures and deadlines.

When selecting chairpersons, it is helpful to select tentatively 10 to 30 percent more than are actually needed to provide a high quality technical program of the desired size; not all those chosen will be able to serve and not all will be able to obtain the needed number of invited papers.

Establishing a Management System for Handling Submitted Papers, Author Correspondence, and Requests for Information

A next step is to establish a management system for handling requests for information, correspondence with session chairpersons and authors, the mailing of author's kits, the receipt and reviews of submitted abstracts and papers, registration fees (if they are received by the conference chairperson and staff), and conference expenses and payments. Rapid replies to requests and careful handling of all submittals are of utmost importance. A detailed, accurate record of all replies and transactions is also essential. Letters or memoranda should be sent to confirm telephone conversations. Appropriate forms, control sheets, and logs are helpful, as are a computerized logging system and mailing list.

Making Final Arrangements with the Conference Hotel

The conference manager or local or conference arrangements committee must complete the arrangements with the hotel and negotiate the contract for rooms and services. Among the items to be considered are the numbers of single, twin, and double guest rooms the hotel will commit and the rates for each; the number of room reservations the society must guarantee; the procedure and deadline for hotel reservations; the number, size, and location of the meeting rooms and whether the meeting rooms will be retained or released to the hotel in the evening; the number of suites and hospitality rooms; the equipment and room setups to be provided; the number of breaks and meal events, the style of service, and the menus; and the number of complimentary rooms the society will receive. The final arrangements and costs must be relayed to the finance committee for use in determining the final conference budget and to the publications committee for use in preparing hotel and conference registration forms.

Arranging Social Programs and Special Events

The local arrangements, hospitality, spouses' program, and tour committees must select and arrange the social events and tours that will be held in conjunction with the conference. Provisions must be made for tickets, prices established, and contracts negotiated with transportation and tour companies if they will be involved. Tours and social events must be self-supporting and appropriate fees must be set for each. Information about the events and the fees must be relayed to the finance and publications committees.

Arrangements must be made with the visitors and convention bureau of the host city for maps of the city and brochures about current events and attractions for distribution at the conference. Copies of menus must be obtained from area restaurants if they are to be displayed in the hospitality area.



Setting Registration Fees and Deadlines

Next, registration fees must be set for the conference and the activities and events to be included. Fees must be high enough to cover the major costs of the conference and associated publications, yet low enough to be affordable by most members of the target audience and ordinarily about the same as the registration fees of comparable conferences of other professional societies. Setting fees too low detracts from the perceived quality of the conference and makes it difficult to break even on costs; setting fees too high decreases conference attendance.

Among the options when setting fees are to:

- Set a high fee and include all meals, social events, and conference proceedings
- Set a low fee and include no meals, social events, nor proceedings
- Set a moderate fee and make purchase of meals and proceedings optional.

The advantages of including meals and proceedings in the registration fee are that (1) universities will generally pay registration fees but have limits on per diem allowances and will not cover separate costs of expensive audiovisual equipment or proceedings; (2) having the cost of meals included in the fee makes attendance at meals higher, if that

is a consideration of the society; and (3) having proceedings included in the registration fee guarantees a certain amount of funding to offset publication costs. Nevertheless, a high fee may keep potential participants away. The ability of members to pay the proposed registration fee and the effect on attendance should be closely considered in relation to conference costs and other sources of revenue.

At the time of setting registration fees and the activities they will cover, prices should be established for each item separately, so that members can purchase extra meal or events tickets or extra proceedings. Separate fees should also be set for advance and regular registration and for student, spouse, and one-day registrations if these will be available, as well as for the service charge for cancellations. At the same time, deadlines should be set for advance registration and for cancellation and return of all or part of the advance registration fee. A reduced advance registration fee can be an encouragement to members to register early; the planning committee can thus obtain an early indication of potential attendance. Previous experience with the ratio of early registrants to attendees can also be helpful in predicting conference attendance.

A final issue to be considered when setting registration fees is who is to receive complimentary registration. In some cases distinguished guests are given complimentary registration; in others, all speakers. The policy should be stated in conference publicity and particularly on the registration form.

Finalizing the Budget

As contracts are negotiated and cost projections become commitments, a final budget can be prepared for society approval. Adjustments in planned expenses may be required in order to "meet the bottom line." To maintain budget control, information about commitments and expenses must be obtained regularly from individual committee chairpersons.

Establishing the Program: Arranging Technical Sessions, Socials, and Special Events

An important step is scheduling the technical sessions, socials, and special events and establishing the conference program. Once papers have been selected, the program chairperson must arrange and organize the technical sessions through consultation with the session chairpersons. The scheduling of the program sessions depends in part on the number of papers received and the length of the conference; the balance of papers, tutorials, and workshops; the number of short courses; the number of special and social events; the preferences and interests of society members for early morning or late evening sessions; and special events or attractions in the local area.

Among the questions to be asked when scheduling technical sessions are the following [13]:

· How interested is the audience in the topic of this

session?

- How important is the topic to the audience?
- What are the attitudes of the audience toward the topic? Is is a "hot issue?" A controversial one? A routine matter?
- How does the session relate to the objectives of the conference?
- How familiar is the audience with the topic of this session? Will they need information from another session first?
- Who are the speakers?
- How much appeal will the session have? How many participants will it attract? How much discussion is anticipated?
- How much time will the session require?
- What resources will be necessary for the session?
- Where will the session best fit into the schedule? Morning? Afternoon? Evening?

It is critical when organizing a program of two or more parallel sessions to minimize topic conflicts, that is, to avoid running two technically similar sessions on the same topic at the same time. It is helpful to schedule sessions so that a person interested in one topic can follow it sequentially over a portion or over the total number of program days.

Furthermore, when arranging the program, the chairperson should:

- Avoid scheduling receptions or socials for the break between afternoon technical sessions and evening workshops, especially if complimentary alcoholic beverages are to be served
- Avoid scheduling popular professional tours to compete with technical sessions
- Schedule sessions with common breaks. This simplifies
 the hotel's task of setting up breaks, reduces cost to the
 society, and gives members the opportunity to meet
 informally with a larger number of people



- Be sure all meeting rooms are accessible to handicapped individuals, especially rooms for sessions that might be of special interest to the handicapped
- Attempt to strike a balance of technical sessions, workshops, and social events over the days of the conference.

Once the arrangement of papers in a session has been established and published, it should not be arbitrarily changed when the session begins. Changing the sequence makes it impossible for people who want to session-hop to hear the papers of interest. Similarly, if a speaker is unable to attend, the time allocated for his or her paper should be devoted to discussion to keep the session on its published schedule.

Coordinating Conference Arrangements

Throughout the entire year before the conference, it is critical for the conference chairperson to have frequent communication with the conference planning committee, the conference manager, and the program committee to follow up on details and to coordinate activities. The conference chairperson should make frequent contact with the conference manager and the local arrangements committee to ensure agreement on hotel arrangements and conference details. Of special importance are rapid replies to all correspondence, including courteous but firm responses to individuals whose requests must be denied.

The program chairperson should have frequent contact with session chairpersons, consulting them about program details, providing instructions for reviewing papers, reminding them of deadlines for submittals, providing copies of brochures and programs for distribution to the participants in their sessions, and instructing conference speakers.

At the conference itself, the conference manager and conference and program chairpersons must be available at all times as troubleshooters, problem solvers, and diplomats to anticipate possible difficulties and, if at all possible, to solve them before they arise. No matter how careful the planning, some minor unexpected difficulties will occur, but they can most often be solved easily by exercising tact. The conference manager, the conference and program chairpersons, and their colleagues should plan to arrive at least 24 hours before the conference begins to check on details, make final arrangements, and become familiar and comfortable with the conference setting [11].

The conference or program chairperson may want to host a special half hour for session chairpersons, conference committee members, and society officers before the conference as an informal get-together to solve last-minute problems and to acknowledge and express appreciation to those who have helped.

Setting the Stage for the Next Year's Conference

The success of an annual conference always begins at the previous conference with the announcement of the new conference theme and site, the conference chairperson, and the program chairperson. It is critical to have available at each conference the call for papers and a bulletin board display that features the next year's conference. Among the exhibits there should be the call for papers and brochures that describe the next conference city and facilities. Photographs and publicity materials to be used in the displays can be obtained from the convention and visitors bureau of the host city.

It is also helpful to have announcements of the next conference published at the end of each conference proceedings (and in the program if space is available). Decorative seals can be placed on the conference program to announce the next conference theme, date, and location. Signs can be placed over selected chairbacks at business meetings, plenary sessions, luncheons, and the banquet to draw attention to the next year's meeting, and lapel buttons or decals for attendees' badges can be distributed. Souvenirs can be available in the exhibit area for conference attendees to take home as reminders of either the theme of the next conference, the next conference city, or both. Questionnaires can be included in the registration packets or distributed at the conference to obtain suggestions for topics and sessions for the next program.

In addition to such publicity, the new conference and program chairpersons should hold a forum with interested participants to discuss plans for the next year. It is important that the new conference officers establish visibility and a willingness to include current conference participants as well as newcomers in the next year's conference. Throughout each conference, they should actively seek interested persons to chair next year's sessions.

ANTICIPATING AND MANAGING CONTINGENCIES

The first few hours of the conference are the worst: All the crises and problems seem to arise simultaneously. It is here that the care and attention of the advance planning bear fruit—or do not if they were lacking [11]. With even the most careful planning, contingencies can arise. To minimize difficulties, facilities and arrangements should be carefully checked before the participants and meeting attendees arrive, difficulties anticipated, and opening day activities closely monitored. This involves (1) identifying potential problem areas on an initial walk-through; (2) reviewing conference arrangements with hotel staff; (3) overseeing the opening of registration; and (4) being available to answer questions and resolve difficulties throughout the conference.

Identifying Potential Problem Areas on an Initial Walk-Through

Either individually or as a team, the conference manager, the conference chairperson, and the program chairperson should walk through the facility, assuming at the outset the role of a conference attendee who has just arrived. Any potential problems with hotel registration should be identified and corrected. Directional signs should be checked to make sure that attendees and participants can easily locate the conference registration area and meeting rooms. The setup of the registration area should be checked: The tables should be in an easily accessible, yet safe place where cash, printed materials, and equipment can be secured. There should be separate lines for preregistrants and those registering at the conference. If a large number of attendees is expected, several lines should be set up for preregistrants, divided alphabetically. Strategically placed signs should clearly designate the registration arrangement and direct those registering at the conference first to a table with the blank forms to be filled out, then to the registration line. The setup of the information desk nearby should also be checked. Brochures and maps of the local area should be available at the information desk, which should be staffed by knowledgeable individuals who can answer questions about the facility, the conference, and the host city.

As the next part of the walk-through, the following should be checked to make sure that all setups have been completed according to the master schedule and that all the needed equipment is on hand and in place:

- Setup of the meeting rooms and suites (if done in advance)
- Setup of the exhibits or display area(s)
- Setup of the press room
- Arrival of audiovisual equipment and supplies if rented from an outside supplier; otherwise, the availability and functioning of the equipment provided by the facility as specified in the contract
- Arrival of office equipment and supplies for the registration area
- Arrival of proceedings, programs, and other printed material to be distributed during the conference (if shipped in advance).

Any problem areas identified during the initial walkthrough should be corrected before attendees and participants arrive and the conference actually begins.

Each morning before conference sessions begin, the placement of directional signs, the arrangement of the meeting rooms, and the placement and functioning of audiovisual equipment should be checked and any difficulties should be resolved.

Reviewing Conference Arrangements with the Hotel Staff

Before the conference begins, a meeting should be held with the hotel staff to review the master schedule, to answer any questions about the arrangements and services to be provided, and to give final counts for breaks and meals. Any changes in the master schedule must be confirmed.

Overseeing the Opening of Registration

The registration process is the "front door" of the conference. It is where conference attendees get their first, and sometimes lasting, impression of the society's professionalism as well as cordiality. The registration area should be set up attractively, with its location clearly designated. The individuals who staff the registration desk must be knowledgeable about the conference program, the facility, and the community [12]; courteous and professional; and able to work under pressure when registration lines are long. The conference manager and conference chairperson should be available to oversee the opening of registration to ensure smooth functioning of the process.

Being Available to Answer Questions and Resolve Difficulties

The conference chairperson and the program chairperson should be available throughout the conference to serve as troubleshooters, problem solvers, and diplomats. Questions and problems should be handled with tact. Volunteers should be available to deliver messages, run errands, and aid in problem solving. Having runners available facilitates rapid adjustments when they are needed and more efficient operation of the conference, especially if session monitors are not available.

COORDINATING POST-CONFERENCE ACTIVITIES

Four tasks remain after the conference has been held: (1) writing letters of appreciation; (2) ensuring that bills are paid; (3) reporting the conference to society members; and (4) preparing the financial report for the society.



Writing Letters of Appreciation

After the conference, preferably within two weeks, the program chairperson should send a letter of appreciation to all session chairpersons. The conference chairperson should send a letter of appreciation to all who have helped with conference arrangements, planning, and organization.

Ensuring That Bills Are Paid

The conference chairperson has the responsibility for checking the accuracy of the bills submitted and following through to ensure that bills are paid on a timely basis.

Reporting the Conference to Society Members

An important follow-up activity is the report of the conference to society members. This is usually an article in the society's newsletter or magazine, accompanied by photographs of key conference scenes. An announcement of the availability of proceedings can also be included. The follow-up publicity not only highlights activities of the conference just passed but also alerts members to the next conference.

Preparing the Financial Report for the Society

The final post-conference activity is preparation of the financial report for the society with details about the number of participants and attendees, the financial status of the meeting, and the distribution of funds.

CONCLUSION

The keys to a successful conference are advanced planning, delegation of authority to knowledgeable associates, strict attention to detail, coordination of activities, and careful follow-through. Building on the experiences of those who have chaired conferences in previous years and accounting for contingencies are also important. Using a systematic approach greatly simplifies the task of planning. A systematic approach makes it possible to complete each stage of the process on time and to have a successful meeting of high quality, year after year.

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Appendix: Guidelines for Planning and Scheduling Conference Publications

This section describes the publications associated with a professional society's annual conference and discusses some of the options and alternatives for producing them. When designing and producing conference publications, consideration should be given to historical precedent for format and content so that there is continuity over the years.

CALL FOR PAPERS

The first major publication is the call for papers or preliminary conference announcement. It provides advance publicity to announce the conference and to solicit contributions of papers from society members and others. Among the components of the call for papers are

- Name of conference/theme/title
- Name of sponsoring organization
- Dates
- Location: City and meeting place
- Logo
- General description of the aims and format of the conference
- Listing of main topics and areas of interest in which papers are solicited



- Requirements for submitting an abstract or a paper for review
- Deadline for submissions
- Information about submitting the abstract, paper, and other required materials
- Return address of sender and space for mailing information
- · Form for requesting author's kit
- Preliminary program request (clip-out and send-in form)
- "Please post" statement at top of page.
- Person to contact for further information.

If the call for papers will be the only correspondence between the society and its members before camera-ready abstracts are submitted for review, information about selection, publication, and presentation must be included in the call for papers—information that would otherwise be included in an author's kit.

Additional information might include:

- Detailed instructions for preparing the abstract along with a sample of the desired form
- Information about audiovisual equipment that will be provided and a statement about charges for extra equipment
- Information about notification of receipt of abstracts and acceptance of them for presentation
- Author information form
- Checklist of items to be included and submitted so that the abstract can be reviewed
- Author index cards
- Keyword index cards
- · Reply card to notify member of receipt of abstract
- Reply card to notify member of acceptance or rejection.

Design Considerations

The call for papers should combine good graphic design and well written text so that pages and panels are attractive as well as functional. The call for papers should contain as much information as possible in the available space, without detracting from the design. It is possible to fit all of the needed information for a call on one $8\frac{1}{2}$ '' × 11'' sheet printed on two sides and all of the information for a combined call for papers and author's kit on four $8\frac{1}{2}$ '' × 11'' pages (printed as a single 11'' × 17'' sheet, two-sided, folded first in half, then in thirds for convenient mailing). When the call includes clip-out and send-in forms or reply cards, panels should be designed so that information vital to the recipient will not be missing after the form is returned.

The call for papers, like other publications, should be triplechecked for typos.

Setting Deadlines

The most important consideration when setting the deadline for the call for papers is that it be available at the annual conference the preceding year. The deadline should be set, working back from the target date, to account for the following:

- · Time to prepare draft
- Time to receive approval of drafts of calls
- · Time to compose brochures and review final product
- Time to print brochures
- · Time to mail completed brochures to the conference site.

It is especially helpful to have society officers and the program chairperson of the current conference review the final draft of the next year's call for papers to make sure that inadvertent errors have not occurred.

ANNOUNCEMENTS

If society guidelines and publications permit, a series of one-page announcements should be designed for sequential use throughout the year to publicize the conference. The first announcement should appear in the proceedings of each year's conference to forecast the next meeting, and one announcement should appear in each successive issue of the society magazine or journal. Such announcements serve to focus members' attention on the conference throughout the year. Each announcement should include:

- The name of the conference and the conference theme
- The sponsoring organization
- Location: City and meeting place
- Conference dates
- Logo
- Photographs or drawings to capture attention
- A catchy saying in keeping with the conference theme or logo.

Design Considerations

Announcements should be designed to reflect the conference publicity theme, to attract attention, and to keep the conference theme and city in the minds of society members. Repeated mailings and publicity bring members to meetings; a single flashy campaign is not as effective [6].

Setting Deadlines

The series of announcements should be designed early enough to meet the printing deadline for the current year's proceedings and to meet the individual deadlines of the society journal. The entire series should be designed at one



time to provide a unified, comprehensive publications package.

AUTHOR'S KIT

The author's kit is the single most important conference publication for simplifying the chairperson's management task. The quality of the instructions given and the structure provided for handling author correspondence can mean the difference between being able to organize properly prepared materials for the proceedings and having to retype submitted papers to correct format errors. The role of the author's kit is pivotal: the better the instructions, the better the author's kit; the better the author's kit, the better the papers—and the proceedings.

The author's kit typically includes the following:

- · General information about the conference
- Examples of correctly completed forms
- General information about preparing an oral presentation based on the paper
- Deadlines
- Author information form
- Author checklist of information to be included
- · Reply card for notification of receipt of manuscript
- · Reply card for notification of acceptance or rejection
- Card to specify keywords to simplify preparation of the keyword index for the proceedings
- Card to specify authors' names to simplify preparation of the author index for the proceedings
- Control sheet to record transactions in handling of papers
- Copyright transfer form
- Request for audiovisual equipment
- Manuscript mats with nonreproducing blue lines
- · Instructions for preparing manuscript mats
- Cardboard
- Return envelope
- · Hotel registration information and form
- Conference registration form.

Design Considerations

In devising the author's kit, one goal should be to have the author provide as much information as possible and to do as much of the clerical work as possible, i.e., to complete the forms, to self-address reply cards, and to complete keyword index cards and control forms. Having authors prepare forms and reply cards enhances accuracy and reduces the need for secretarial and administrative assistance to complete the task when the author's kits are returned. A second goal should be to make the author's job as easy as possible by being considerate and realistic in making demands of authors.

All instructions in the author's kits should be absolutely clear. They should be "product-tested" by secretaries so that any confusion about typing of papers can be avoided before the kits are distributed. The instructions should state that all information to be supplied is to be typed or printed; otherwise, legibility of the material may be very poor and addresses difficult to decipher.

Forms should be designed for attractiveness, readability, and maximum efficiency. The author's kit should be designed for minimal weight to reduce mailing costs. Information should be supplied on labor-saving reply and detachable index cards rather than on individual sheets of paper for transcription to other forms.

Setting Deadlines

The deadline for the author's kit must be set so that all parts are printed and assembled for distribution to authors at the time notification of acceptance of abstracts is made, or one month after the call for papers is mailed if authors will be required to prepare full papers on camera-ready mats for review and acceptance or rejection.

PROGRAM

After the call for papers, the program is the main publicity medium, and it should be as attractive in appearance as skill and finances can make it [11]. The conference program provides advance notice of the technical sessions and events of the annual meeting and should include all of the selling points of the conference [11]. The program generally includes the following:

- Cover with conference logo, title of conference, location (city and meeting place), dates, and title (e.g., Program, Advance Program, Preliminary Program, Final Program)
- Table of contents
- Welcome
- Listing of sponsoring organizations
- General conference information and program highlights
- Technical program session listing
- Technical program matrix (one-page summary)
- List of social events
- Conference registration form with fees
- · Hotel registration form with room rates
- Author or participant index
- List of conference planning committee members
- · List of society officers
- Information about the conference site
- Map of meeting rooms.

Design Considerations

The program should have an attractive, functional design. General information about the conference and details about local arrangements, social programs, technical sessions, and registration should be in clearly defined sections with appropriate headings. Information that will be referred to frequently should be in easily accessible places: for example, the map showing location of meeting rooms on the inside front or inside back cover, the technical program matrix (or program highlights summary) in the center, and registration information at the back. The program should be designed so that the pages have a balanced and symmetrical appearance. Short announcements and catchy phrases can be used as filler, as can graphic illustrations. These can pertain to the current program or to the next year's conference.

To simplify composition and design, restrictions should be set on length of titles, number of author's names permitted (or to be printed in program), and number of affiliations cited. One policy might be to limit titles to 60 characters including spaces, to include only the affiliation of the senior author, and to limit the maximum program entry for any presentation to three lines (some papers include 15 or more coauthors).

Each page that lists technical sessions should show the meeting day and date and should clearly identify morning and afternoon sessions. Top or side headings can be used.

A full-sized standard $8\frac{1}{2}$ \times 11'' page can be used for the program, or the sheet can be folded to make a pocket-sized booklet. For the latter, a 1 4 $\frac{1}{4}$ \times 8" page is generally less expensive than a 4 $\frac{1}{4}$ \times 9" page.

Setting Deadlines

The deadlines for the program should be set by working back from the target date on which the program is to be received by members and allowing for

- Creation of draft after papers are accepted and sessions organized
- · Careful checking of all information to be included
- Composition (typing and typesetting), layout, and design
- · Time to proofread and check final program
- Time to print program
- · Time to mail programs to members.

PROGRAM HIGHLIGHTS BROCHURE

A program highlights brochure—in essence an abstract of the full program—can be prepared as an advance notice of main conference events. The program highlights brochure can resemble the design of the program and should contain the following:

- Cover page with conference logo, title of conference, location (city and meeting place), date, and title—e.g., Program Highlights
- General conference information including program overview, publications, social events, and major attractions of the area
- Technical program matrix
- Description of conference hotel (rooms, recreational facilities, restaurants)
- Conference registration form with fees
- Hotel registration form with room rates
- · Panel for mailing label and return address

• Person to contact for more information.

Design Considerations

The program highlights should be a well designed brochure that will attract attention and motivate individuals to attend the conference.

Setting Deadlines

The deadlines for the brochure should be set as follows, working back from the target date on which the brochure is to be received by members and allowing for:

- Creation of draft
- Composition
- · Proofreading and checking proofs
- Printing time
- Mailing time.

NEWSLETTER

As an alternative to the program highlights brochure, a conference newsletter can be designed and published as the preliminary conference announcement. It should contain the following:

- Society logo
- · Name, theme, location, and dates of conference
- Conference logo
- General description of the conference, including program highlights
- Technical program matrix
- Highlights of the social program
- Photographs of the conference site
- Town information
- Hotel registration form
- Conference registration form
- Ticket order form.

Design Considerations

The newsletter should be attractively designed and should carry out the conference theme and logo. It should serve to motivate society members to attend the meeting.

Setting Deadlines

The deadlines for the newsletter should be set by working back from the target date on which the issue is to be received by members and allowing for

- · Time to obtain photographs and source materials
- Time to create draft and check accuracy of information
- · Time for composition, layout, and design
- Time to proofread and check corrected proof
- Time to print
- Time to mail to members.

DESCRIPTIVE ABSTRACTS

After the conference program has been arranged, the ab-

stracts of each of the talks should be assembled for publication in the society newsletter or journal. The collection will consist of:

- Title of conference, location, and dates
- Names of conference and program chairpersons along with their addresses (so they can be contacted for more information should members so desire)
- Note about conference proceedings (in which full text of papers will be published)
- Abstracts arranged according to conference sessions with session title and name of chairperson
- Workshop abstracts
- Tutorial abstracts.

The abstracts can be published before or after the conference but they publicize the conference when they are published in advance. They should be compiled and submitted in keeping with the deadline for the issue of the society journal in which publication is targeted.

PROCEEDINGS

The conference proceedings, an archival document that provides a record of the conference presentations, typically consists of the following:

- Title page
- Copyright and ordering information; Library of Congress number and catalog number
- Disclaimers
- Preface
- Table of contents
- · Message from president or chairperson of society
- Message from conference chairperson
- Welcome from mayor of city or other distinguished persons
- Information about society
- Information about conference (general)
- · List of society officers
- Technical program matrix
- Photographs of city (filler)
- · Invited and contributed papers or extended abstracts
- Abstracts of workshops
- Abstracts of tutorials
- Tutorial papers
- Keyword index
- Author index
- Note pages (filler).

Design Considerations

The proceedings should be organized according to a functional plan. Papers should be grouped sequentially according to the sessions in which they are presented so that papers on similar topics are together and individuals can quickly locate the papers corresponding to presentations by numeric cross-referencing.



Alternatively, papers can be grouped by topic and then alphabetically by the last name of the first author, but such an approach does not provide for maximum ease of use of the proceedings either during the talks or when a reader seeks information on a particular topic presented in one session.

The proceedings should be of standard and uniform page size from year to year; only the width of the spine should vary. The type and the society logo on the spine should be placed in the same position each year so that successive volumes align neatly. The cover and front-matter pages should create a distinctive image. The cover design should reflect the conference theme by presentation of either an interesting photograph, a computer-generated illustration, or the conference logo. The front-matter pages should be attractive and easy to use.

The technical program matrix should be an easily locatable part of the front matter. It can be run on the back cover, but in this position it detracts from the overall design.

If necessary, attractive note pages should be designed and used as filler at the end of the book. Other pages of filler can list the society officers, with or without photographs, or show views of the host city. It is helpful to include a one-page announcement as a forecast of the next year's conference at the end of each proceedings.

When preparing the proceedings, it is of utmost importance to proofread and carefully check the accuracy of all information provided, especially numbers, page numbers, and the spelling of names.

Setting Deadlines

The deadlines for proceedings must be set early enough to allow for:

- Obtaining photographs and releases if needed
- · Compiling papers and front and end matter
- Design of cover
- Composition
- Reviewing galleys

- Reviewing page proofs and corrected proofs
- Printing
- Shipping the books so that they will arrive at the conference site shortly before the conference and at a time when the hotel can accommodate storage.

REGISTRATION PACKET

Although not strictly a conference publication, the registration packet deserves attention, for it should have an attractive design and convey a professional image of the society.

Providing a kit for conference attendees is more prestigious than providing separate copies of program, proceedings, errata, badge, and registration receipt [6]. The kit can be a specially designed envelope, plastic portfolio, or briefcase and can include some or all of the following:

- · Notebook in a specially designed cover
- Ballpoint pen with conference logo
- Conference program
- Badge
- Events tickets
- Maps
- Brochures of local attractions
- · Personal planning calendar
- Letters of welcome
- Call for papers and information about next year's conference
- Program addenda
- Announcements
- Gifts or souvenirs.

Design Considerations

The design of the materials to be included should conform to that of other conference publications.

Setting Deadlines

The deadline for the registration kit, envelope, or packet must be set by working back from the opening day of the conference to allow for:

- Design and composition
- Proofreading and checking composition and proofs
- Printing materials
- Assembling components
- Shipping kits so that they will arrive at the conference site shortly before the conference and at a time when the hotel can accommodate storage.

PROGRAM ADDENDA OR ERRATA

The program addenda or errata notify participants and attendees of changes in rooms and times, cancellations, and additions such as special events and tours. Notices can be printed on a special form, photocopied on the conference letterhead, or published as a single or daily conference newsletter. They can consist of the following:

- Heading (e.g., Addenda, Errata)
- Name of conference, location, dates, and conference logo
- Welcome from the chairperson
- Welcome from other distinguished persons (e.g., mayor)
- Program changes (date, time, place)
- Program cancellations
- Program corrections
- Program additions
- Program highlights
- Guest program notes
- Thanks and acknowledgments
- Special event announcements and listings
- · General announcements and notices.

Design Constraints

The addenda should be attractively arranged, carefully proofread, and complete.

Setting Deadlines

The deadlines for preparing the addenda should be set so that the maximal number of program changes can be incorporated while allowing for printing and distribution to conference attendees in a timely fashion.

PRODUCTION ALTERNATIVES

The call for papers, the author's kit, the conference announcements, the program, the program highlights brochure, the front and end matter for the proceedings, and addenda or errata can be composed by typewriting, typesetting, or word processing. Typesetting gives a professional appearance, allows greater flexibility in design and thus more attractive pages, and permits more information to be published in fewer pages. Having the publications professionally typeset and designed is more expensive than having them typewritten, however, and additional time may be required for preparing and producing copy. Typewriting is less expensive and can be done in-house, but the appearance of typewritten material is not as attractive and more pages



are required. The use of a word processor with the capability of producing boldface headings and right- and leftjustified margins plus a combination of type faces improves the appearance of typewritten pages. To maximize the amount of information contained in typewritten publications, pages can be prepared on oversized sheets and photoreduced.

Depending on the publisher chosen, it may be possible to prepare material in typewritten form using a word processor, then transmit the diskette to the publisher for photocomposition without the intervening step of a second typesetting. If available, this may be the most efficient method of producing the material and it will produce the most attractive results.

If it is not possible to typeset all materials, modes can be combined as follows: typesetting the call for papers, where attractive design and compactness are of utmost importance; typewriting or word processing the program on oversized sheets for photoreduction; and typesetting cover, title page, and front and end matter for the proceedings. At the very minimum, the cover and the title page of the proceedings should be typeset. Addenda and errata can be typeset or typewritten. The mode of reproduction chosen (printing or photocopying) is determined by the type of material to be reproduced, the number of copies to be made, and the specific publication. Related considerations are page size, paper stock, and number of colors used in the printing. Standard page sizes $(8\frac{1}{2}" \times 11"$ or $11" \times 17"$) are most readily available, easy to use, and least expensive. Paper of standard weight in standard colors is less expensive than paper of special weight, color, or finish. The cost of printing is higher for colored ink than for black, and the cost increases significantly with the number of colors added.

When selecting a paper stock for printing the program, have a dummy or mock-up prepared (with allowance for the additional weight of ink and mailing label) and have the weight checked to prevent selecting a paper stock that will be significantly more costly to mail while making only a negligible difference in appearance.

SUMMARY

Distinctive, timely, accurate publications are essential to ensure a successful annual conference. The greater the number of types of publications issued, the more successful their effect will be.