Conference Organization

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Getting Started

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

Conference Planning Committee

- A group of people that holds some responsibility for shaping the conference and planning the program.
- Look for persons to serve in the committee who:
  - Are qualified to serve due to their experience on substantive issues, respect given to them by professionals in the field, or their organizational, negotiation, or communication skills.
  - Are dependable.
  - Are able to accept responsibility.
  - Work well with others.
  - Can make decisions.
  - Can abide by the decision of the majority.

Conference Planning Committee

- Typically, the Conference Planning Committee shares responsibility with the *Conference Coordinator* and the *Sponsor* for the following three functions:
  - Serve in an advisory capacity.
  - Approve scheduling and logistical decisions.
  - Respond to recommendations and suggestions on conference content.
- Document the responsibilities to avoid conflicts

Committee Coordinator

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

The Conference Coordinator

- Look for a person who:
  - Possesses good organizational skills.
  - Is a good communicator.
  - Has an eye for details.
  - Can function well even if things get a little stressful. A good sense of humor is a big plus.
- 2 ways to select a conference coordinator
  - Member of conference planning committee.
  - Sponsor designates a coordinator.
    - Internal – member of sponsoring agency.
    - External – a person who is exceptionally skilled in conference planning.

Management Functions

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

Administrative Functions

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

Number of Participants

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

Conference Dates

- A timetable of at least 12 months to organize a conference.
- Consider hotel and meeting facilities selection – location, dates and price.
  - Peak/value/shoulder periods.
  - Many hotels split the week into 3 time slots:
    - Sunday-Wed; Wed-Friday; Fri-Sunday.

Conference Dates

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

Conference Budget

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

Preparing the Budget

- Conference planners need to prepare *split folio.*
  - Split folio – determines which cost will cover by the conference *master account* and which will be paid by persons attending the conference.
- Be sure to clearly communicate your split folio plan to the hotel, in writing, when your *letter of agreement is prepared.*
  - Letter of agreement – written confirmation of agreements between you and the hotel what is sent our prior to the contract.)

Site Selection

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

Site Selection – Matching Conferences with Facilities

- **Downtown hotel in large city**
  - Attendees are in meetings most of the day but have large blocks of personal time around lunch or in the evening.
- **Airport hotel/airport meeting facility**
  - Conferees flying in for a one- or two-day conference.
- **Suburban hotels**
  - If many conferees will be driving to the meeting.
- **Conference center**
  - Intensive training and need to avoid distractions.
- **Resort properties**
  - Provide bargains during off-season or shoulder periods.
- **Convention center**
  - Used for very large conference when hotel don't work.

Site Selection - Conference History Data

- Wanted by Conference and Visitors Bureaus (CVB), hotels and other conference facilities.
  - a well-documented record of past conference, if a similar conference was held in the past.
- Conference History data must include:
  - Conference dates/locations.
  - Number of sleeping and double occupancies / rooms picked.
  - Number of meetings rooms used each day.
  - Types of functions hold each day.
  - Arrival and departure patterns.
  - Food and beverage information.
  - Activates planned away from conference site.

Site Selection - Fact sheet

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

Site Selection - Fact sheet

- You can mail fact sheets directly to each hotel and/or meeting facility.
  - If you already know which facilities can accommodate your needs.

- You can contact the CVB's in the locales you are considering. Ask the CVB's to send your fact sheet and your *request for bids* to only those facilities that fit your needs.

Planning the Program

- The program planning process should begin after the following steps have been completed:
    - The conference purpose has been defined.
    - The audience profile has been determined.
    - The number of participants has been estimated.
- A well-planned program interrelates the above three factors with conference events, presentation methods, and event scheduling.

Events

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

Presentation Methods

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

Tips on Scheduling

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

Speakers and Presenters

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

Searching for Speaker

- First decide what issues to cover, and then ask who is associated with that issue.
- Sample question format
  - "Who are some good people to speak on the political aspects of building community networks?"
  - Or, "who is a good person to speak on technology activism on issues affecting people with disabilities?"
- Once made a final choice on speaker, follow up with a letter.
- Two weeks before conference send a reminder letter.

Follow-up Letter for Speakers

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

Executing the Conference Plan

- **Registration**
  - Exchange of information (sometimes money).
- **Conducting Sessions and Events**
  - Using signs.
  - Following the Agenda.
  - Staffing.
- **Evaluation**
  - Form a evaluation committee.
  - Evaluation form.

References

- http://polaris.gseis.ucla.edu/pagre/organizing.html
- http://www.ojp.usdoj.gov/ovc/publications/infores/res/confguid/welcome.html

Thank you!

Questions