



## IASSIST Conference Planning Handbook

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### TABLE OF CONTENTS:

1	FORWARD .....	3
1.1	PRELIMINARIES OF THE HANDBOOK .....	3
1.2	PURPOSES OF THE IASSIST CONFERENCES .....	3
1.3	STRUCTURE AND CONTENT OF THE HANDBOOK .....	4
1.4	HANDBOOK DISTRIBUTION .....	4
1.5	RESPONSIBILITY FOR THE HANDBOOK .....	4
2	LOCAL PREPARATION FOR THE CONFERENCE .....	4
2.1	ADVANCE PLANNING AND SUBMITTING A BID TO HOST THE CONFERENCE .....	4
2.1.1	<i>Time</i> .....	4
2.1.2	<i>Location</i> .....	4
2.1.3	<i>Submitting a Bid to Host a Conference</i> .....	5
2.1.4	<i>Elements of a Proposal</i> .....	5
2.1.5	<i>Local Arrangements Committee</i> .....	6
2.1.6	<i>Checklist of Meeting Room Requirements</i> .....	6
3	PLANNING AND CONCEPTION OF THE CONFERENCE .....	7
3.1	PROGRAM COMMITTEE .....	7
3.2	CHOICE OF A CONFERENCE TITLE .....	7

3.3	CHOICE OF A CONFERENCE LOGO .....	7
3.4	PARTICIPATION AND ESTIMATING NUMBER OF PARTICIPANTS .....	7
3.4.1	<i>Speakers, Chairs and Workshop Coordinators</i> .....	8
3.4.2	<i>Outreach Support for Attending the Conference</i> .....	8
3.4.3	<i>The Press, the Media, and Other Listservs</i> .....	8
3.4.4	<i>Plenary Speakers, Guests, Honored Members and Visitors</i> .....	9
3.5	TECHNICAL SUPPORT.....	9
3.5.1	<i>Technical Checklist</i> .....	9
4	BUDGET AND FINANCES: POLICIES AND PROCEDURES .....	11
4.1	CONFERENCE BUDGET.....	11
4.2	BANK ACCOUNT AND CREDIT CARD ACCOUNT .....	11
4.3	REVENUES .....	12
4.3.1	<i>Advance (Seed Money) from IASSIST Treasurer</i> .....	12
4.3.2	<i>Registration Fees and Forms</i> .....	13
4.4	EXPENSES .....	19
4.4.1	<i>Conference Expenses: Outline</i> .....	19
4.4.2	<i>Member Participation and Financial Assistance</i> .....	20
4.4.3	<i>Hotel and/or Conference Facilities Costs</i> .....	21
4.4.4	<i>Workshop Expenses</i> .....	22
4.4.5	<i>Poster Session Expenses</i> .....	22
4.4.6	<i>Social Events Expenses</i> .....	23
5	STRUCTURE OF THE CONFERENCE.....	23
5.1	BASIC STRUCTURE OF THE IASSIST CONFERENCE .....	23
5.1.1	<i>Organization of the Program</i> .....	24
5.1.2	<i>Organization of Social Functions</i> .....	25
5.1.3	<i>Meeting Organization: Administrative, Business, Wrap-up</i> .....	26
5.2	A FURTHER BREAKDOWN OF ACTIVITIES .....	26
5.2.1	<i>Pre-Conference Events</i> .....	26
5.3	DURING THE CONFERENCE.....	27
5.3.1	<i>Awards/Prizes/Gifts</i> .....	27
5.3.2	<i>Social Activities</i> .....	28
5.4	POST-CONFERENCE .....	28
5.4.1	<i>Planning a Post-Conference Outing</i> .....	28
5.5	A DESCRIPTION OF PROGRAM COMMITTEE RESPONSIBILITIES.....	28
5.5.1	<i>Selecting a Program Chair and a Program Committee</i> .....	28
5.5.2	<i>General Chronological Order of Program Committee Activities</i> .....	30
5.6	DESCRIPTION OF LOCAL ARRANGEMENTS COMMITTEE RESPONSIBILITIES .....	36
5.6.1	<i>A General Chronological Order of Local Arrangement Committee Activities</i> .....	36
5.6.2	<i>Dividing Areas of Responsibility with the Program Committee</i> .....	40
5.6.3	<i>Organizing Labor Prior to and During the Conference</i> .....	43
5.6.4	<i>Working with the Meeting Place</i> .....	44
5.6.5	<i>Determining Equipment Needs and Other Hardware Issues</i> .....	44
5.6.6	<i>During the Conference: Requirements of Local Arrangements</i> .....	45
5.6.7	<i>After the Conference</i> .....	47
	APPENDIX 1: SAMPLE REGISTRATION FORM FROM CONFERENCE WEB SITE, 2004 .....	49
	APPENDIX 2: CALL FOR PAPERS FROM WEB SITE, 2008 AND 2004 [IF JUST WANT MOST RECENT, DELETE 2004] .....	51
	CALL FOR PAPERS .....	51
	TECHNOLOGY OF DATA: COLLECTION, COMMUNICATION, ACCESS AND PRESERVATION .....	51
	APPENDIX 3: EXAMPLES OF EVALUATION FORMS .....	55
	APPENDIX 3.1: WORKSHOP EVALUATION .....	55
	APPENDIX 3.2: CONFERENCE EVALUATION.....	57
	IASSIST 2008 CONFERENCE EVALUATION .....	57
	APPENDIX 4: EXAMPLES OF EMAIL TO CONFERENCE CHAIRS .....	60
	APPENDIX 4.1: CHAIR LETTER #1 .....	60
	APPENDIX 4.2: CHAIR LETTER #2 .....	62
	APPENDIX 4.3: CHAIR LETTER #3 .....	65
	APPENDIX 5: EXAMPLES OF NOTES FOR SPEAKERS .....	68
	APPENDIX 5.1: NOTES FOR SPEAKERS: IASSIST 1990 .....	68
	APPENDIX 5.2: NOTES FOR SPEAKERS: EDINBURGH, 1993 .....	69
	APPENDIX 6: SAMPLE "AUTHORIZATION TO PUBLISH" FORM AND RELATED HANDOUTS .....	71

APPENDIX 7: LIST OF SCHOLARLY JOURNALS AND LISTSERVS .....	74
APPENDIX 8: GUIDELINES FOR PREPARING POSTER SESSIONS .....	76
APPENDIX 9: EXAMPLES OF CALL FOR SPONSORSHIP LETTERS .....	78
APPENDIX 10: FRIENDS OF IASSIST 2003 .....	83
APPENDIX 11: WORKSHOP PRESENTERS REIMBURSEMENT POLICY .....	84
APPENDIX 11.1: SAMPLE NOTIFICATION TO WORKSHOP PRESENTERS: NOTIFICATION OF INTENT BUT NO GUARANTEE .....	86
APPENDIX 11.2: SAMPLE NOTIFICATION TO WORKSHOP PRESENTERS: MINIMUM COMPENSATION GUARANTEED .....	86
APPENDIX 11.3: SAMPLE POST-CONFERENCE REIMBURSEMENT FORM .....	86
APPENDIX 12: EXAMPLES OF CHAIR RECRUITMENT LETTERS .....	88
APPENDIX 12.1: CHAIR RECRUITMENT LETTER: TARGETED .....	88
APPENDIX 12.2: CHAIR RECRUITMENT LETTER: CONFERENCE COMMITTEE .....	88
APPENDIX 13: CONCURRENT SESSION CHAIR RESPONSIBILITIES AND SUGGESTED TIMELINE .....	89
APPENDIX 13.1: CHAIR RESPONSIBILITIES: .....	89
APPENDIX 13.2: CONCURRENT SESSION CHAIR TIMELINE .....	89
APPENDIX 14: SAMPLE CHAIR REPORT FORM .....	91
APPENDIX 15: DESCRIPTION AND APPLICATION FOR OUTREACH FUNDING FROM WEB SITE, 2004 .....	92
APPENDIX 16: VISA SUPPORT POLICY – OUTREACH PARTICIPANTS AND OTHERS REQUIRING VISAS TO ATTEND THE CONFERENCE .....	93
APPENDIX 17: EXAMPLE WEB SUBMISSION FORM, 2009 .....	94
APPENDIX 18: REPORT ON THE 2009 CONFERENCE PROPOSAL MANAGEMENT SYSTEM	96

## **1 Forward**

### **1.1 Preliminaries of the Handbook**

The purpose of this Handbook is to assist those who will be responsible for running the IASSIST Annual Conferences in the years to come. The information contained within has been put together by several individuals who have had experience running past conferences. While many things necessarily change from year to year, and from conference site to conference site, there is a surprising amount of continuity involving the decisions made and the deadlines set. It is hoped this manual can be continued as a living document, dynamically maintained by succeeding generations of conference planners.

### **1.2 Purposes of the IASSIST Conferences**

It is clear that, despite the growth of the Internet, e-mail and listservs, the annual conference still offers us the best way to communicate with each other, to share ideas, and to seek feedback from our peers. Both formally, through the delivery of papers and the presentation of poster-sessions, and informally through the one-on-one or small group conversations, a surprising amount of professional support and advice is given. The networking that takes place during break periods and in the evenings is just as important as the organized sessions, plenaries, workshops and roundtables. The conference provides us a way to conduct professional training and to upgrade our own skills through workshops. It allows us to promote data librarianship and archiving as well as innovations in social science technology, and to plan the future of our profession via roundtables and other working groups. The conference gives us the opportunity to take advantage of the expertise of the people who make up the membership of the Association, as well as bring new people into IASSIST. It is the only time of the year when both the Administrative Committee and the general membership are able to meet and vote on important issues. The formal presentation of papers

at the conference promotes scholarly writing by the membership and offers them the opportunity to publish in the Association's quarterly journal.

### **1.3 Structure and Content of the Handbook**

This Handbook purports to give advice and hand along “conventional wisdom.” The intention is to move from the general to the specific, singling out areas of high importance. The reader is encouraged to sift and winnow through it as warranted.

To keep the Handbook easy to use, new headings should be marked as bookmarks so they appear in a regenerated Table of Contents.

### **1.4 Handbook Distribution**

This Handbook is available from the IASSIST website to anyone affiliated with IASSIST conference planning. Other pertinent conference planning materials (such as the registration database) should be made available to Local Arrangements and Program Chairs.

### **1.5 Responsibility for the Handbook**

Recent Program Chairs and Local Arrangements Chairs are asked to update it as they see fit and post the updated version on the IASSIST website (<http://www.iassistdata.org/conferences/hosting.html>). The Program Chair is asked to insure that members of the Program Committee and the Local Arrangements Chair are aware of the availability and location of the manual. Current Program Chairs assume ultimate responsibility for the Handbook.

## **2 Local Preparation for the Conference**

### **2.1 Advance Planning and Submitting a Bid to Host the Conference**

#### **2.1.1 Time**

Traditionally, the Conference has been held around the U.S. Memorial Day and Canadian Victoria Day holidays (late May). The actual timing of the conference is dependent upon many diverse (and sometimes unanticipated) variables such as hotel availability, university session scheduling, other conflicting conferences, and so on. It is sensible to aim for later in the academic calendar when more members are able to attend.

#### **2.1.2 Location**

IASSIST has a long tradition of rotating between U.S., Canadian, and non-North American sites. A four-year cycle has generally been followed consisting of a U.S. conference followed by a Canadian conference, then a second U.S. conference to be followed by a fourth conference held outside the North American continent. It should be noted that the Administrative Committee will accept proposals for review from all IASSIST regions; our adherence to this pattern is not required. Generally, the non-North American conference is

held in conjunction with a meeting of IFDO (the International Federation of Data Organizations).

### **2.1.3 Submitting a Bid to Host a Conference**

The IASSIST Administrative Committee intends that proposals to host the annual IASSIST Conference should be made to the current IASSIST President in time to be considered at the annual Administrative Meeting two years before the conference for which the application is being made. A call for bids is sent to the membership in the fall or early winter each year. The call describes the bidding process and includes information about the most recent upcoming conferences. See "Guidelines on Bids to Host IASSIST Conferences" on the IASSIST website at <http://www.iassistdata.org/conferences/hosting.html>.

### **2.1.4 Elements of a Proposal**

A proposal to host the annual conference should cover each of the following elements that should be available to support local arrangements for the conference:

- A. Technical (physical)
  1. Support for workshops/presentations / poster sessions
  2. Support for conference planning / participation by organization
  3. Technical / AV support
- B. Accommodation and facilities
  1. Proximity of accommodation
  2. Conference rooms (workshop labs, plenary and concurrent sessions, poster sessions and e-mail facilities)
  3. Lunch and coffee facilities (and AV facilities for the business meeting)
- C. Human resources available
  1. Program chair (not part of local arrangements, but if the Program Chair has been identified it should be noted in the proposal)
  2. Organisational (a mix of Conference Services and volunteers - required to coordinate many local arrangements roles)
  3. Financial, e.g., money handling
  4. Technical support, many roles
  5. Web site creation and management
  6. Maintenance of the conference database
  7. Design: e.g., conference logo design
- D. Financial factors

The proposal should include a preliminary budget summary with categories for local arrangements (Conference site fees, food and events, technical support fees, etc.). The proposal might also address issues such as:

- Likelihood of attendance and conference program participation, both local and international
- Financial support from local, regional or international organizations

Factors that will be taken into consideration in evaluating conference proposals will include:

- The cost of travel for attendees, length of travel, attractiveness as a travel destination, exchange rates, etc.
- Need for support by IASSIST (financial and organizational)
- Likelihood of expansion of membership following a conference
- Strategic (IASSIST Regional development)

## 2.1.5 Local Arrangements Committee

As indicated above, the identification of a Local Arrangements Committee (LAC), or at least a Local Arrangements Chair, is required before the designation of a particular city as a conference site. Therefore, the Local Arrangements Chair is generally in place when the site is chosen, and preliminary preparations for hotel/conference facilities can begin 18 months to two years in advance.

One person needs to be designated the manager of the Conference Web site and will need to provide the server space, design, and production of the site. This is a large responsibility and is crucial to the conference planning and publicity. For the past few years, the conference Web site has been the responsibility of the LAC.

## 2.1.6 Checklist of Meeting Room Requirements

Ideally, the hotel or other conference site should be within walking distance of the workshop locations and local restaurants since most attendees will be without transportation. Sometimes the conference meetings are held at a university or conference center, and hotel space is used exclusively for housing attendees and pre-conference meetings. Whether or not the hotel is used for meetings, the primary hotel should be large enough that it has a Sales or Special Events Department experienced in conference planning. If a university is used as the conference venue, then the extent of the university's resources should be ascertained as soon as possible in terms of conference services (e.g., online registration, money handling, and coordination). The LAC may choose to work with a Sales Representative or a Conference Services' representative throughout the year planning virtually every detail of the conference. It is good to keep in mind, however, that it is not uncommon for the representative to leave and another individual to be assigned the account without the LAC ever being informed. It is therefore advisable for the LAC to check in monthly with the representative (and everyone else supplying social or entertainment activities) to keep him or her up to date, and hopefully avoid or minimize unexpected problems.

A basic list of facilities requirements should include:

- Meeting room facilities: plenary sessions (180-200 capacity, 3 days), concurrent sessions (approximate capacity: 90, 3 days), workshops (maximum capacity: 30, 1 day), poster sessions (average number of poster sessions: 12, 1 day), e-mail services (4 days), lunches (3 days), administrative and business meetings (various), optional speakers' room (4 days), bulletin boards, sandwich boards
- Audio Visual equipment (numerous: microphones, podiums, overhead projectors, computers for presenters to use, Internet connections, Ethernet cables, phone lines, extension cords, etc)
- Food service and dining rooms for Roundtable Lunches, the Business luncheon (requires microphone and podium), coffee breaks (3 to 4 days)
- On-site or nearby parking for attendees
- One or more on-site contact persons. Usually this will either be the Sales Rep, or another person assigned to the conference by the hotel or meeting facility.
- Hiring of two student runners during the conference.
- A room, which may be separate from the meeting rooms, that can serve as the Turkey Action Group meeting room
- An obvious Registration/Information area
- A small locked room where Registration Desk materials may be stored at night
- Convenient and accessible banking and photocopying
- Rental of cell phones for local arrangements coordinators

## **3 Planning and Conception of the Conference**

### ***3.1 Program Committee***

The Program Committee (PC) can take a number of different forms. It can be quite small, say five or six people, double that size, or even larger. What all have in common is the position of Program Chair (or Program Co-chairs). The Chair is a pivotal position that decides who will serve on the PC and what their roles will be. It is strongly encouraged that the Chair strives to have a multi-national committee that includes members from the United States, Canada, and outside the North American continent. The Chair is a major influence on the intellectual content of the conference, and it is the Chair who assumes ultimate responsibility for deciding on a conference title as well as general thematic structure. It is essential that the PC work along with the Local Arrangements people to set an agenda for putting together sessions, plenaries, workshops, and social events. The individual members of the PC generally serve as catalysts for the creation of conference workshops, plenaries, and sessions by suggesting ideas, finding likely speakers, and often acting as session organizers or chairs.

As mentioned above, one person needs to be designated the manager of the Conference Web site and will need to provide the server space, design, and production of the site. This is a large responsibility and is crucial to the conference planning and publicity. For the past few years, the conference Web site has been the responsibility of the LAC.

### ***3.2 Choice of a Conference Title***

This is a subjective choice that is best made during the previous year's conference among the Local Arrangements Committee and the fledgling Program Committee. Otherwise, during the first month or two following the preceding conference the PC should convene and decide on the title and text for the Call for Papers. Regardless of when it is done, it needs to be done before the Web site and first publicity are available later that summer. The choice of title will be a factor in the success of the Call for Papers.

### ***3.3 Choice of a Conference Logo***

The choice of logo will be an important publicity consideration, primarily for the Local Arrangements Committee, and may reflect the conference title or location. A logo should be available late in the summer for publicity. It is important for a timely start to the conference Web site and other early publicity; the logo is helpful for fundraising materials and correspondence. It will be incorporated into participants' nametags, presenter name cards, conference bags, and roundtable signs. The logo, prominently displayed, is effective in directional and venue signage.

### ***3.4 Participation and Estimating Number of Participants***

For a successful conference, it is essential that the number of participants be correctly estimated. This is particularly true for the Local Arrangements planners as their expenses and expected income are dependent upon number of registrants. About 80% of registrants will register early. When planning registration, keep in mind that reminders about registration deadlines and publicity updates (e.g., program availability) will result in peaks in registration. It can be helpful to give to give a day's grace for the early registration price. Cancellations will

also occur. [Note: In 2006, as a result of an effort to contact session presenters and urge them to register to get early registration rates, over 95% registered early.]

It is recognized that this estimate of attendance is difficult. We highly recommend that past LAC chairs be consulted. In general, attendance falls somewhere in the 150 and 200 range. The variation between the two extremes has to do with the amount of local interest in attending the conference, the conference site's proximity to major population centers, the desirability of the conference site as a place to visit, and, other less-tangible variables.

The conventional wisdom, which should be taken with a grain of salt, is that conferences held on the East coast of North America tend to draw the largest audiences.

Attendance figures for recent years:

1998:	184
1999:	188
2000:	157
2001:	215
2002:	149
2003:	194
2004:	164
2006:	255

Member and non-member activities, services, and levels of participation are the same during the conference. Conference planners will have to take into account spouses of registrants who may want to purchase tickets to participate in social events. Planned attendance of social events should be tracked through a required field on the registration form. [Note: In 2006, there were over 30 local attendees, which boosted registration numbers.]

### **3.4.1 Speakers, Chairs and Workshop Coordinators**

IASSIST is not in a position to provide financial assistance for participation in the conference. All speakers and Chairs are expected to register for the conference and pay conference fees. Plenary speakers are not expected to pay conference fees and are invited to attend activities during the day of the plenary at no charge. This information should be conveyed to individuals at the time of initial contact to avoid any misunderstandings.

It is now IASSIST policy that the Workshop Presenters are offered one free conference registration per workshop because of the high amount of work involved in presenting a workshop. So, if there were two presenters for one workshop, the conference registration fee would be divided among the presenters (it is the choice of the presenters how they wish to apply the fee). See the workshop policy and sample communications with workshop presenters in [Appendix 11](#).

### **3.4.2 Outreach Support for Attending the Conference**

See [section 4.4.2.1](#) regarding outreach financial assistance to current and potential IASSIST members. Information about outreach funding should be posted on the conference Web site as soon as possible, preferably at the end of the summer prior to the conference.

### **3.4.3 The Press, the Media, and Other Listservs**

While an IASSIST conference is not the type of event that makes the evening news, there are a few things the LAC can do to ensure positive public relations. Press releases announcing the conference may be sent to scholarly journals and/or list serves (for a partial list, see [Appendix](#)

7) in the autumn or winter before the conference. The press release should contain the name, phone number, and e-mail address of a contact person so that those unfamiliar with IASSIST can make inquiries.

Postings should also be made to major listservs ([Appendix 7](#)). In recent years, the Program Committee has taken responsibility for publicizing the program to the media listed in [Appendix 7](#) (at least twice: the call for papers and the announcement of the program). The LAC has publicized the conference to IASSIST members on IASST-L at key points (for example, when the conference Web site is launched; when the registration form is available) and to local media and listservs (such as selected faculty and staff at the host institution).

It is also helpful to notify the local Convention and Visitors Bureau, or Chamber of Commerce of the dates of the conference. These agencies can distribute conference announcements to local businesses resulting in things as diverse as discount coupons for photocopying and rental cars to menus from local restaurants. These agencies can also put the LAC in touch with hard-to-find services such as producers of promotional goods.

### 3.4.4 Plenary Speakers, Guests, Honored Members and Visitors

While IASSIST is not in a position to provide financial assistance for participation in the conference, the President may, following advice from the Treasurer, allocate funds from the general IASSIST accounts to cover registration fees for plenary speakers (usually a special keynote speaker), guests, honored members, and special visitors. Requests for this kind of assistance will be forwarded to the President by the Program Planners or the Local Arrangements Committee. On occasion, special presentations and achievement awards may take place at IASSIST conferences, usually during the banquet dinner, and are initiated upon request of the President of the organization, to mark retirements or acknowledge service. Such activities can be organized through the LAC. The distribution of funds for these activities shall be decided by the President and Treasurer, and reported at the annual Administrative Committee Meeting.

## 3.5 Technical Support

To ensure the success of the conference and especially its program, technical support should be treated as a crucial planning, budgeting and coordination activity. Depending on the degree of technical support planning of the LAC, there may also be additional technical support expenses. Money and time committed to technical support (and its planning) will be evidenced in the quality of the program and the effectiveness of on-the-spot troubleshooting.

### 3.5.1 Technical Checklist

Technical support	Special Funds?	When to start planning	Function
Microphone, Sound system	√	one year, double-check at 3 months (part of facility booking)	All conference sessions (plenary and breakout)
	(probably included)	"	Workshops
	√	"	Business lunch, also podium

Technical support	Special Funds?	When to start planning	Function
Internet		one year, double-check at 3 months (part of facility booking)	All conference sessions
		one year, double-check at 3 months (part of facility booking)	Workshops
		one year, double-check at 3 months (part of facility booking)	Poster sessions, e.g., 12 minimum
Technician(s)	√	one year, double-check at 3 months	All conference sessions (One technician recommended per session room, full day)
	√	Six months Double-check at 2 months, 3 weeks (software), 3 working days	Workshops. Same recommendation as above. Also ensure all workshop lab administrators are experienced and flexible in software installation, data loading, account creation and that their availability for testing and setup is 100% including the 24 hours leading up to the start of the workshops, or as needed.
	√	one year, double-check at 3 months (part of facility booking)	Poster sessions 1 experienced technician and experienced LAC volunteer
Software licenses and installation	Ideally no	(1) Six months  (2) Six weeks	Workshops (1) All labs should have basics, spreadsheet, Internet, and ideally they should have statistical, GIS and data viewer. (2) Presenters confirm special needed software, which should not require special

			licensing support (\$).
	Maybe	Two months	Poster sessions Reserve 4-6 tested laptops as backup for poster session presenters
User accounts		One month Test day before Test 1 hour before workshop	Workshops Request setup of user accounts and test. There can be problems. Administrator should be available half hour before workshop
Equipment	√	Two months	12 monitors for poster session presenters (laptop screens generally are inadequate for group demos)
	Ideally not	Two months	Laptop for presentation depot. All presentations should be solicited or loaded on presentation depot, ideally just before or just after presentations (technical support volunteer should facilitate this)
	√	Two months	Computer in each presentation room (for all plenaries, concurrent sessions, and conference wrap up)
ONLINE REGISTRATION AND PAYMENT		Two years plus	Confirm you have this before applying to host

## 4 Budget and Finances: Policies and Procedures

### 4.1 Conference Budget

The annual conference is funded by registration fees with the exception of any commercial or academic sponsorships that have been negotiated. Since none of the speakers receives a gratuity, the entire conference budget has to be calculated to cover operating expenses (See section [4.4 Expenses](#)).

### 4.2 Bank Account and Credit Card Account

Some LACs in the past have opened a local checking account for making conference purchases for three reasons: 1) Many (U.S.) businesses will not accept out-of-state checks; 2) an accurate check register can help keep accounting records in order; and 3) managing a bank account may be the best way to transact wire transfers for refunds, or to issue petty cash for

incidentals during the conference and similar transactions that, e.g., may not be supported by one's parent institution's audit requirements. Others have used the Conference Services of their home organizations (e.g., in 1998, the Yale University Conference Services Office) that provide central accounting and payables procedures, as well as payment of large invoices, which bank checking account regulations may make difficult.

Conference Services or one's parent organization may have stricter audit requirements than the owner of a bank account, e.g., for not issuing money for petty cash. If this is the case, a bank account with sufficient funds should also be opened. In addition, many institutions do not allow any funds processed by the university to be used in the purchase of liquor, or they may require a special application or account type. Verify this with your institution early so that any special arrangements including an outside account can be completed prior to the conference.

The bank, or a branch, should be within walking distance of the hotel, as it is not uncommon for the LAC to be making daily deposits during the course of the conference. The name on the account should be something other than IASSIST as this is the name of the main IASSIST checking account maintained by the IASSIST Treasurer. For the 1992 conference, the account was held in the name of IASSIST'92. Be sure that a local address and phone number are printed on the checks. Checks (or cheques in UK English) should require two signatures but it should be the responsibility of one person to write them to eliminate confusion over which checks have been written. The account should be established by the autumn before the conference so that the LAC can begin paying for deposits, graphic services, printing and postage (if it is the LAC and not the PC that is taking care of this). Advance (seed money) from the IASSIST Treasurer for expenses in the autumn and winter is discussed under [4.3.1](#).

The account should remain open until approximately September or October after the conference to allow all payments to complete or whenever a cutoff date is confirmed for tracking down non-payments/payment problems. The earlier in the autumn the cutoff date is, the better. This is a practical matter. As time goes on, it becomes more difficult for the LAC or conference services to manage processing of late payments. At the cutoff time, any remaining funds should be sent to the IASSIST Treasurer after first verifying with the IASSIST President that it is appropriate to do so.

IASSIST currently has two credit card accounts, one in US Dollars and one in UK Pounds Sterling. Arrangements for the use of these accounts must be made with the Treasurer and Assistant Treasurer in charge of the specific account. If either account is used in lieu of a local credit card account and the currency is different from the local currency noted on the registration form, notice to conference registrants will need to be made regarding the credit card debit, which is dependent upon the daily exchange rate. The easiest way of making that clear is to include the UK Pound Sterling (or US Dollar) rate as the standard rate for credit card charges on the registration form. Please note that the logistics of handling credit card payments locally is generally much easier and should be used whenever possible.

## **4.3 Revenues**

It is not the purpose of the IASSIST conference to make a profit; rather, revenues generated by registration fees are used solely to finance the conference. Profits have been used to fund outreach participants and cover registration fees for special speakers in the conferences the next year(s).

### **4.3.1 Advance (Seed Money) from IASSIST Treasurer**

Seed money will be needed before any revenue is generated to pay for things like deposits on social/entertainment events, and conference logo. Seed money may be obtained from the

IASSIST Treasurer. As mentioned in section 4.2 the local bank account should be established before any expenses are incurred. It is expected that seed money be recovered and reimbursed to the IASSIST treasurer. How much seed money is enough? Amounts will vary depending on costs. For the 2003 conference, the LAC received \$10,000 (CAD) in September for the conference the following May and this amount was sufficient.

Universities and other institutions will often require a contract or guarantee from IASSIST that they will not be held responsible for any cost overage. IASSIST is responsible for covering the costs of the conference in excess of conference income. Contact the IASSIST Treasurer if a contract or letter of assurance is needed by your institution.

### 4.3.2 Registration Fees and Forms

Compared with most professional association's conference fees, IASSIST fees are kept as low as possible so as to make the conference accessible to the widest audience. The clearest way of determining fees is to project as accurately as possible the total cost of the conference. It is better to make a conservative estimate regarding attendance than to plan on a maximum number of people. It is recommended that a spreadsheet package be used for budget estimates as it helps in monitoring the per capita costs of the conference.

#### 4.3.2.1 Fee Structure Considerations: Conference

Registration fees ideally meet the expectations of the IASSIST members and potential members, including students, as well as those of the Local Arrangements Committee (especially having an early-bird rate). To arrive at this structure, look at past fee practices and also consulted with administrative committee members and past LAC chairs, e.g., 1999.

Conference registration (3 days)	Early-bird	One-day	Non-member	Student
"FULL MEMBER" (e.g., around \$ 240-275 USD in 2002-2003)	.75 of FULL (MEMBER or NON-MEMBER)	.5 of FULL	FULL + membership + small amount (e.g., \$20 USD)	.5 of FULL or .33 of ONE-DAY

##### 4.3.2.1.1 Early registration rate

An early registration rate is critical for conference and workshop planning. It is an excellent tool for the LACs to estimate conference attendance several weeks before the conference. About 80% of [paying] attendees will register early [over 95% in 2006], assuming that enough time has been allotted between the start of registration and the early registration deadline, and that at least one reminder about the early registration has been sent. An early rate also reduces the member communication workload just prior to the conference when the LAC has many competing time demands. One planning assumption that was made in 2003 in estimating attendance was in assuming that as of the early bird deadline that all unregistered presenters would attend. In fact, this inflated our attendance estimates, as over 10 presenters were not able to attend. Many of these did not know until very late that they could not attend.

##### 4.3.2.1.2 One-day registration rate

One-day registration is helpful to have for the local community and special attendees such as sponsors.

#### **4.3.2.1.3 Student rate**

There should be a special rate to encourage student participation in the conference and in IASSIST.

#### **4.3.2.1.4 Member – Nonmember rates**

Expanding IASSIST membership is important. A small fee reduction for members encourages both attendance and membership.

#### **4.3.2.1.5 IASSIST membership fees and conference registration**

Renewing and new members find an online membership renewal/commitment option at time of online registration to be convenient. These fees should be unbundled from registration fees; the membership fee is a separate issue than the conference fee structure.

The LAC should be aware that there needs to be tracking of monies and details relating to membership separate from conference registration. It is helpful to work closely with the Treasurer and the membership chair about tracking and follow-up. These membership fees should be reported to the Treasurer as soon as possible following the conference so they may be entered into the membership database. The membership fees should be transferred to the appropriate Regional Treasurer.

### **4.3.2.2 Setting Workshop Fees and Administration**

There are two differences between the fees for the conference and the workshops. First, the early-bird rate is only available to members (non-members cannot register for workshops until the end of early registration), and second, participants register by workshop choice.

Because there are workshop size limits (determined by the PC-workshops and the LAC), registration needs to be closely tracked and second choices should be offered. When it is determined that a workshop is full, the registration form should indicate this and remove the registration option. An automated database or spreadsheet is helpful in this regard.

#### **4.3.2.2.1 Workshop fee structure considerations**

Here is a sample fee structure for consideration.

One workshop	Early-bird	Non-member	Student
FULL, e.g., \$50 USD	.75 of FULL	1.5 of FULL	.67 of FULL

### **4.3.2.3 Summary: Conference and Workshop Fees**

A fee structure will usually incorporate the early-bird rate across registration options to ensure early registration and good conference planning. Here are examples of three previous fee structures: Ann Arbor, 2006, Madison, 2004, and Ottawa, 2003.

2006: All fees are in US Dollars.						
IASSIST Activity	Member		Non-Member		Student	
	Before April 21	After April 21	Before April 21	After April 21	Before April 21	After April 21
Per workshop	\$75	\$75	\$75	\$75	\$75	\$75
Full conference	\$275	\$325	\$350	\$400	\$150	\$180
One-day conference	\$150	\$200	\$200	\$250	\$100	\$125

2004: All fees are in US Dollars.						
IASSIST Activity	Member		Non-Member		Student	
	Before April 24	After April 24	Before April 24	After April 24	Before April 24	After April 24
Per workshop	\$50	\$75	\$50	\$75	\$50	\$75
Full conference	\$275	\$325	\$350	\$400	\$150	\$180
One-day conference	\$150	\$200	\$200	\$250	\$80	\$100

All fees are in Canadian Dollars ○ <u>Registration is available</u> ○						
IASSIST Activity	Member		Non-Member		Student	
	Early registration	After April 9	Early registration	After April 9	Early registration	After April 9
Per workshop	\$75	\$100	N/A	\$100	N/A	\$50
Conference	\$300	\$350	\$380	\$430	\$150	\$180
One-day conference	\$150	\$175	\$200	\$225	\$60	\$75

**Early registration rates apply until April 9, 2003**

#### 4.3.2.4 Registration Forms: Making the Fees Clear to Registrants

It should be noted that registration fees may not cover the same things every year (e.g., banquets, outings, receptions, lunches) and there may be a bit of variation. For this reason, it is important that the registration form clearly state what is and what is not covered in the registration fees. The LAC should also note, as a workload issue, that even with a very clear registration form, they may be answering numerous e-mail questions about registration fees. All of this is much easier than refunding money caused by misunderstandings.

#### **4.3.2.4.1 Registration fees – What to include and track**

For example, the fees may cover:

- Attendance at all sessions
- All social events unless otherwise stated
- Luncheons, including a Business Meeting luncheon

And the fees may not cover:

- A post-conference excursion, if planned
- Association membership

Types of payment should be tracked as separate items:

- Conference Fee, Early Registration – full conference
- Conference Fee, Early Registration – one day
- Conference Fee, Regular Registration – full conference
- Conference Fee, Regular Registration– one day
- Workshop Fee (by workshop, considering size limitations)
- Membership Fee
- Extra guest tickets

It is helpful to registrants if the online registration form or the registration database calculates the total conference price and displays this with details.

#### **4.3.2.4.2 Registration refund policy**

It should be clearly stated that registrants who cancel on or before a pre-set date will receive a refund of the total amount paid less an administrative charge, e.g., \$50.00. Registrants who cancel after this date will not receive a refund. Some exceptions should be expected, e.g., in 2003, several international registrants were not accepted for visas.

#### **4.3.2.4.3 Membership information on the form**

Information requested on the registration form for the conference should include ALL items currently listed on the IASSIST Membership form (with the exception of the credit card currency options). Some items such as inclusion on the listserv and the membership directory should be filled out only if paying for a membership. Please encourage new members to include their e-mail address if it is optional on the conference registration form. This has been a problem in the past.

For people paying memberships, the following information needs to be recorded on the membership form for reporting purposes:

- New member or renewal
- Change in address
- Change in e-mail
- Web site URL, if applicable

This information is needed for the IASSIST database and for getting new members onto the listserv. A database of new and renewing members that includes all membership information should be sent to the Treasurer as soon as possible after the end of the conference. New members are particularly anxious to have their membership processed quickly in order to take advantage of post-conference discussions on the listserv. It is very important that all information about participants be carefully entered and edited in the conference registration database. IASSIST uses this information for the membership records and follow up contacts.

For registrants who are NOT paying membership fees, the following information needs to be recorded on the registration form:

- Do you want to be kept on a mailing list for information on future conferences?

#### **4.3.2.4.4 Supported methods of registration and payment**

Registration has traditionally been done by mail or FAX. However, in 2006 and 2003, we accepted Internet registration and linked all registration and membership information to a registration database. In 2003, we did not have a sufficiently secure server, so payment was sent in separately by mail or fax. In 2006, we did accept payment (credit card information) via the Internet, though actual processing of credit cards was conducted manually.

#### **4.3.2.5 Sponsorship and Exhibitor's Fees**

Certain companies, e.g., software vendors, hardware manufacturers, publishers, etc., may be willing to sponsor the conference in some way in return for the opportunity to mount displays in the conference venue including the poster session venue or to include literature in the conference package. Consideration should be given as to whether it is appropriate or feasible to ask for sponsorship of a specific part of the conference or to set a fixed sponsorship rate, which was first done in 2003 to considerable success. All sponsors were given the same privileges. In 2003, a new concept was introduced for sponsorship – Friends of IASSIST.

##### **4.3.2.5.1 Friends of IASSIST**

###### **Background**

The Friends of IASSIST program was formally introduced for the 2003 IASSIST conference as a way of officially involving a variety of organisations with which IASSIST has some sort of relationship as part of the conference. The purpose in doing this is to give these organisations some visibility and status at the conference and to raise money to offset the costs of staging the conference. A similar approach was used informally in other conferences for the same purpose; e.g., Edinburgh in 1993, and Amsterdam in 2001, among others. The purpose of including this section in the conference-planning handbook is to encourage others to consider this option when they are hosting an IASSIST conference.

###### **Philosophy**

- This is an **optional** component of an IASSIST conference and should only be used if there are suitable external organisations known to the organisers and there is someone who has **personal contacts** with these organisations who is willing to approach them.
- The goal is for potential sponsors to recognise that formal **visibility and status** for their organisations at the IASSIST conference is valuable to them and there are many ways in which this can be achieved.
- Sponsorship amounts should be kept at a **modest** level.

###### **Putting it into action**

First contacts should be made in person or via telephone with members of the organisations that are known to at least one member of the Local Arrangements Committee. This should be followed by a letter and an information page on IASSIST letterhead. An example of the information page is attached. Once agreement in principle has been reached, follow-up contacts can be made for the transfer of material and funds. In 2003, the participants were asked to make their cheques payable to IASSIST 2003, and they were handled by the conference treasurer.

In 2006, a somewhat different approach was taken. The LAC collected names of organizations that might have interest in participating in the conference. Where contact names were available, they were used. In instances where no contact name was available, the Internet was used to find

contact names at the organizations. First, a letter was mailed in December, followed by a second mailing in January and two email blasts. In addition, sponsorship opportunities were highlighted on the Web site for the 2006 IASSIST conference. Sponsorship packages were also developed that provided opportunities that ranged in costs from \$450 to \$1,100 US.

### **Do you have any Friends at your location?**

There are almost certainly friends at every IASSIST venue. A good place to start is with your university or local institutes and with local suppliers. Not every contribution has to be financial. Support in-kind (e.g., paper, pens, printing, coffee breaks, etc.) can be very beneficial to the success of your conference. Additionally, pay special attention to organizations that are "local" and could use the opportunity to promote their products or services to IASSIST attendees while not incurring travel costs to do so.

### **What about the 'big guys'?**

The IASSIST community works very intensively with organisations such as **SPSS, SAS** and **ESRI**, just to mention a few. While they may seem like very logical candidates for the Friends program, there are a number of things to keep in mind.

- These companies are inundated with requests to support conferences and must make their plans for allocating their promotional funds well in advance of the conference.
- It helps to have a personal contact in the organisation.

The 2003 IASSIST organisers were unable to attract these types of organisations mainly due to timing and insufficient contact.

### **Sponsor contact list**

In 2006, we developed a list of potential sponsors that contained a contact name, mailing address and email address. The contact list, developed in Excel, was updated as better contact information became available and as we received responses -- acceptances or declines -- to our sponsorship inquiries. This list was forward to the 2007 committee for the purposes of contact in 2007 and to continually build the list of sponsorships. New LACs should inquire with the last LAC about obtaining the updated list.

### **Conclusion**

It is a nice touch to contact participants after the conference to thank them for helping us out and to ensure that there were no problems encountered by them. If representatives from the 'Friends' organisations are unable to attend the conference, it is suggested that examples of materials from the conference be sent to the organisations as a follow-up and thank you.

In 2003, potential sponsors were asked to donate \$1000 (CAD) instead of paying for certain items or sponsoring certain events. In exchange for this donation, there were a number of benefits:

- Name and logo on the conference Web site and at the conference
- Name and logo on the padded notebook and canvas conference bag which was provided to each conference participant
- Inclusion of promotional literature in the registration kits
- One free conference registration to a member of the company/organisation
- The conference registration included a reception and dinner boat cruise on the Ottawa River, which provided an informal opportunity to meet and interact with conference participants.

In 2003, this new concept worked quite well for us and we would highly recommend others at future conferences using it. . The 2006 conference also had several sponsors participate. See [Appendix 9 for example contact letters and contact email text and example sponsorship packages](#).

See [Appendix 10](#) for more information on Friends of IASSIST

## **4.4 Expenses**

A preliminary budget should be submitted with the initial proposal to the Administrative Committee two years before the conference and updated by the LAC in the autumn prior to the conference. Again, the use of a spreadsheet package is recommended.

### **4.4.1 Conference Expenses: Outline**

#### **PRINTING and DESIGN**

1. Conference logo
2. Program material for registration packets (program, abstracts, restaurant guide, roster of attendees, maps, invitations to social events, evaluation forms, list of Poster Session presentations, ...)
3. Posters for on-site signage and publicity
4. Informational/directional signs
5. Workshop booklets
6. Nametags
7. IASSIST Quarterly Permission Form
8. Chair Report Form (summary of session highlights)
9. Lunch Tickets if needed (if choice of lunch is offered)
10. Information for Chairs handout
11. Time/cue cards for each meeting room
12. IASSIST Membership Form

#### **POSTAGE / COURIER SERVICES**

1. For requested out-of-country letters of invitation (visa applicants)

#### **CATERING**

1. Morning and afternoon coffee, tea, and refreshments, where applicable
2. Lunches including business meeting luncheon
3. Social/Entertainment events
4. Tables and table cloths (if needed)

#### **HOTEL COSTS**

1. Meeting rooms, if relevant
2. Turkey Action Group Room
3. Hospitality room, if relevant

#### **MEETING FACILITIES**

1. Meeting spaces for Plenaries, Concurrent sessions, refreshments, additional meetings, conference storage space, registration area and optional speakers' room

#### **COMPUTER AND TECHNICAL SUPPORT**

1. Workshops and technical support
2. Poster sessions and technical support
3. E-mail services
4. Technical and AV support for Plenaries and Concurrent sessions
5. A/V equipment rental
6. Hardware rental (PC, modem, photocopy machine)
7. Internet or phone lines if required

#### **SOCIAL EVENTS**

1. Transportation (bus rental)
2. Fees
3. Accommodation/catering

#### **CONFERENCE SERVICES**

1. Registration support fees
2. Sandwich boards for directional signage
3. Tables, table cloths, and table skirts for registration desk and displays
4. Tables and table cloths for catering (if needed)

5. Bulletin Boards to be used near the registration desk and several for Poster Sessions (in addition to computer/Internet hook-ups)
6. Setup and break down fees, e.g., luncheon tables, conference banner

### **MISCELLANEOUS**

1. Promotional items (t-shirts, bags, etc.)
2. Photocopying
3. Hiring of two student runners for conference bag preparations and during conference
4. Rental of cell phones for key local arrangements coordinators
5. Thank you notes and gifts for plenary speakers
6. Photography/film
7. Monthly service fee for checking account
8. Supplies (pens, paper, acetate sheets, stapler, duct tape, thumbtacks, etc.)
9. Flowers for registration desk
10. Turkey Action Group refreshments
11. Gifts for LAC primary volunteers (usually 3-6 people)

Note that many of these items are optional and it is in the purview of the LAC to decide upon the scope of expenditures.

## **4.4.2 Member Participation and Financial Assistance**

As mentioned earlier in this document, IASSIST is not in a position to assist participants financially. All presenters and Chairs are expected to register for the conference. Plenary speakers' conference fees can be waived the day that they present, assuming they only attend the conference that one day. No travel expenses or lodging expenses will be reimbursed, and all contacts with potential speakers, Chairs and so forth should make that clear, as often individuals will incorrectly assume that such assistance is available.

### **4.4.2.1 Outreach Financial Assistance**

The IASSIST International Outreach Action Group provides support to data professionals from emerging economies who are in the position of developing information infrastructures and addressing the issues surrounding the emerging technologies and information policy decisions necessary to support the use and preservation of public and private information. The Chair of the Action Group submits a request to the Administrative Committee for the amount of funds to be allocated from the IASSIST budget (usually this is done a year in advance when the budget is approved). If funds are available from the IASSIST treasury and approved by the Administrative Committee, the following procedure is recommended:

A. Announcement of the financial support is made to the IASSIST membership via the listserv and the conference Web page as early as possible, preferably in late summer or early fall before the conference. Reference to the outreach support is made in the Call for Papers, with a link to the conference Web site for full information. A clear cutoff date is defined. This date should give ample time for the recipient(s) to book their flights, accommodation, etc. An application form on the IASSIST Web site is used for collecting applications.

B. Professionals seeking support should:

- Apply via the Web form, indicating why they would like to attend the IASSIST conference. This application will include a description of the applicant's background, institutional setting, existing structure and future plans.
- Be able to show some level of support from their home institution - it is not expected that the IASSIST funds will cover all conferences expenses.

- Have a working knowledge of the English language (all IASSIST sessions are conducted in English)
- Be prepared to attend the entire conference and participate fully in the proceedings
- Expect to report to the Outreach Action Group and consider producing a brief article for the IASSIST Quarterly on their experiences at the conference

C. The Chair of the Outreach Action Group will collect applications and submit them for review by the Outreach Action Group Members, who shall decide among the applicants.

**Note:** The 2004 Conference budget for Outreach support was \$5144(US) with funds for:

- Coverage of conference fee and workshops
- Air fare

There was a total of \$1030 for one participant. Two additional funded participants were unable to secure visas to attend in 2004. This resulted in a \$4114 carryover to Outreach 2005. No additional funds were committed.

The complete collection of Outreach Final reports can be requested from the Outreach Chair.

This procedure minimizes the frequency of funds changing hands, encourages attendance in workshops and allows the participants to stay in the main hotel for maximum opportunity to network.

#### **4.4.3 Hotel and/or Conference Facilities Costs**

Hotels and conference facilities operate in different ways. Not all hotels or conference services charge for the use of meeting rooms, but there is generally a charge for the use of technical equipment, and a surcharge for room set-up, extra tables and chairs, skirted tables, and so forth. Others charge for use of meeting rooms and include technical equipment, etc., in the charge. If the facilities offer wireless network access, there may be a charge for that access as well. This should all be negotiated and documented at a very early stage. In 2003, preferential meeting room rates were obtained thanks to sponsorship by an academic service on campus, the Library Network. The libraries established a budget fund for the conference, thereby guaranteeing payment. In addition, because the budget fund was under the direction of the Library, the LAC had access to basic fund information as well as the funds for invoice payment.

##### **4.4.3.1 Conference Services Contract**

The number of meeting rooms, tables, desks, chairs, and equipment will depend on how many sessions have been planned by the PC. Typically, there is a deadline for supplying this information to the hotel or conference site, usually late February or early March. A contract signed by the LAC and the hotel or conference site will guarantee that everything supplied in the contract will be provided at the time and price specified. *It is imperative that this contract be written in excruciating detail and that nothing be overlooked.* There is usually very little recourse for setting up a meeting room “with equipment” for a spur-of-the-moment concurrent session.

The contract will also itemize all charges for food and beverage items selected in the menus, and the number of people expected to be served. It is definitely better to slightly over-estimate the amount of food required. *Again, detail is crucial.* Do not assume that there will be refills on coffee unless stated in the contract. Actual menu selection may possibly be made at a later date.

##### **4.4.3.2 Conference Services Expenses**

Many conferences have made use of professional conference service organizations (e.g., Odense, 1997, New Haven, 1998, and Ottawa, 2003). The services vary and the range of help provided may be negotiable. At the 2003 Conference, the University of Ottawa Convention Services, under careful supervision of the LAC, collected registration fees via fax and mail, distributed registration receipts, helped at the registration desk, and took responsibility for the meeting room set up (ordered and covered tables). They also arranged for technical help for the workshops, concurrent sessions and poster session. They did not put together the packets for each registrant, or make arrangements with the caterers (the LAC decided menus and amounts), arrange for buses and boat company, or post directional signs. As well, they did not work with the graphics designers or get involved with the printing and mailing. The LAC maintained the registration database. Numerous other activities and many details were not covered by Convention Services, but their assistance was crucial to the success of the conference and helped reduce the amount of time the local people had to give to registration matters in particular.

#### **4.4.4 Workshop Expenses**

Workshops that require hands-on access to computers can present technical challenges and cost extra money. Often hotels are not equipped to handle the computer hardware, networking, and telephone line requirements that the hi-tech workshops require, and these must therefore be relocated to other sites (such as campus computing labs). Not only may the facilities cost extra money, but participants may also need to be transported if they are not within easy walking distance. Such transportation arrangements can be costly. Nevertheless, IASSIST workshops have in recent years been hands-on, and it is likely that potential workshop leaders and registrants will expect workshops to be hands-on. There may, however, be workshops that only require the use of overhead projection.

The presenters many want to send their presentation to a member of the LAC well in advance of the conference so it can be tested on the computers to ensure that it will work. Also, if a software program needs to be installed on the computers, this should be sent to the LAC well in advance of the conference so that any bugs can be ironed out a week in advance. A workshop room may have to be rented for part of a day to install the program.

Another factor to keep in mind is that most workshops, whether hi-tech or not, require some sort of substantial "handbook" that will need to be duplicated. It is advisable that those running the workshops make arrangements with the LAC to have the duplication of such materials done at the conference site well ahead of time, rather than transport multiple copies themselves. The cost of such duplication then becomes a conference expense.

#### **4.4.5 Poster Session Expenses**

The poster session (with online demos) has proved very popular. A coordinator for the poster session is necessary. It is important to identify the costs involved and to ask all participants to submit a list of realistic requirements as early as possible. Many IASSIST poster presentations are electronic; only some IASSIST posters are of the more traditional "poster board" style. Either form is acceptable and welcomed at IASSIST, although the trend over time has been toward more electronic poster presentations. Exhibitors minimally require display boards and a table (these are usually available from the hotel/university) but usually want access to computers (if they do not bring their own), large monitors, and the network. If exhibitors are providing their own hardware, care should be taken to check the voltage and international adapters may be necessary. In 2003, technical help was hired to help for the day at the Poster Sessions. This cost was well worth it. See [Appendix 8](#) for Guidelines for Preparing for Poster Sessions.

## **4.4.6 Social Events Expenses**

The possibilities for social events are limitless, the only guidelines being that they are affordable, appropriate, and, if possible, indicative of the local area.

The Icebreaker event (sometimes called the President's Reception or the Welcoming Reception) usually takes place the evening before the first day of conference sessions (in other words, the evening of the day of the workshops). This event truly is an icebreaker as it is the first opportunity attendees will have to socialize in a relaxed setting. If the event is not within walking distance transportation will need to be provided. Note that even if events are within "walking distance" some members may require assistance; Local Arrangements people can organize car pools for people unable to walk, and groups can be organized by meeting in the hotel lobby at a given time in order to walk together to a location. Because this event will probably take place slightly before or over the dinner hour, catered food should be provided. If the reception does not provide a full dinner, it should conclude early enough that people have time to return to the hotel or local restaurants in time to move on to dinner. If dinner was included in the reception, the event should enable people to return to the hotel by approximately 9:00 PM. If the reception is a "pre-dinner" or "post-dinner" reception, it should be noted as such in the conference program so attendees will plan accordingly.

The second social event takes place following the second day of conference sessions. Past events have included a trip to the Franklin Delano Roosevelt home in Hyde Park, an outing to an historical site, a dance on the shores of Lake Mendota, numerous boat trips, and other local cultural events. Again, this affair should be catered since it will take place over the dinner hour. At some past conferences, full dinners have been provided, often with achievement awards presented between the main course and dessert. Some banquets have included slide shows, so equipment may be needed for that. Sometimes a speaker's podium and microphone are also needed.

After the second social event, there is an event called the Turkey Action Group (TAG). The LAC should make sure that a room has been reserved at the hotel for this. It typically starts around 10:30 pm after people have returned from the previous social event. At IASSIST 2003, there was a \$300 CAD budgeted expense for the TAG which included the rental of the room, some refreshments and munchies.

The LAC is urged to work closely with local caterers, who can give useful advice as to amount of food needed and types of food recommended. Be mindful that participants have diverse culinary tastes and needs -- for example, there are usually a number of vegetarians present and there may be cultural considerations.

It may be appropriate to contact producers of local fare who would welcome a chance to promote their products to an international gathering. In 1993, for example, the whisky tasting was provided free of charge in return for the opportunity of allowing an international group to drink a selection of brands!

## **5 Structure of the Conference**

### **5.1 Basic Structure of the IASSIST Conference**

In recent times, the conference has consisted of a pre-conference day of workshops, generally held on a Tuesday, followed by three days of the conference itself. Several meetings take place in conjunction with the conference: an Administrative Committee meeting prior to the Workshops (usually the day before), and a General Membership (or "Business") Meeting, usually during lunch on the second day of the conference (usually Thursday). It is helpful for time slots to be blocked off in the conference schedule for committee meetings for IASSIST

committees or other groups for their meetings. PC and/or LC chairs should communicate with IASSIST Committee chairs ahead of time to book times for their groups that can be advertised in the printed program. This provides a valuable structure for committees to set a time slot and be able to notify their group members ahead of time. In addition, the Program Committee for the conference should arrange a meeting at the beginning of the conference to finalize any last-minute details. Moreover, outgoing and incoming Program Committee and Local Arrangements chairs should get together at the end of the conference to debrief and exchange information. Other committees may contact the LAC to arrange a room for a meeting for their group. For example, at IASSIST 2004, the Nesstar Users Group and the DDI Alliance both requested meeting rooms. There have been efforts to offer a Post-Conference Outing over the weekend following the conference.

### **5.1.1 Organization of the Program**

Workshop Day is divided into morning and afternoon sessions that typically last 3.5 to 4 hours. In 2008, several 2-hour workshops were offered and were well received. It has been found that two or three workshops per period are adequate; more may spread participants too thin. It is important for conference planners to recognize that participants pay extra fees to attend workshops and therefore should receive real benefits and be exposed to information that could not be conveyed to them in a standard conference "session." Normally topics chosen for workshops provide "hands-on" experience of some sort---either through laboratory work or via access to specialized hardware and/or software demonstrations. Historically IASSIST has offered an "Intro to Data Libraries" workshop (although not in recent years). Topic choice is wide open, although it is advised that topics be somewhat evenly distributed between "low-tech" workshops and "hi-tech." In recent years, several DDI workshops have been offered. The Program Committee should be attentive to needs and interests expressed by the membership. Past years' workshop evaluation forms can be useful, as are threads on pertinent listservs.

The three conference days following the workshops generally begin with a Plenary Session (i.e., a session for full attendance, not a concurrent) that offers one or more "major" speakers. Program Chairs have often attempted to tie thematically the rest of the day (in whole or in part) with the theme of that morning's Plenary. A Plenary may be one hour in length or longer. This depends on the number of speakers, which is rarely more than two or three, and often just one.

It is traditional that the President of the Association delivers opening remarks and welcomes the participants at the beginning of the first day's plenary. As well, the LAC Chair and relevant committee members (especially tech support) are introduced so everyone knows who they are. Typically, announcements of interest to the general membership are made by Program or Local Arrangements people after the plenary session.

After the Plenary, the membership generally breaks for coffee and then reassembles into three sessions running "concurrently" (at several recent conferences four sessions have been run concurrently to accommodate more presentations). These concurrent sessions can take a variety of forms, -- for example, a panel where a set of issues is rotated among a group of discussants, or a straight paper presentation session with a number of speakers (usually three to five; although three seems the best number) delivering papers. Generally, a minimum of 15 minutes should be allowed for each speaker, with a question and answer period of 15 minutes for questions and discussion; this can generally be accomplished with 3 speakers in a 90-minute slot or 4 speakers in a 120-minute slot, given the realities of the need for transition time between speakers and buffer time in case anything goes wrong. There was a fair amount of discussion after the 2008 conference about the four session time slots. While it does allow for more presentations, several members felt that it spread things too thin and that they didn't feel like they had attended the same conference as others they spoke to. It also makes trying to avoid topic conflicts more difficult; that is, it becomes harder to avoid two sessions with topics that would appeal to the same audience in the same time slot. That said, it does allow for a greater

range of presentations. The program committee should weigh the options carefully before adding a fourth session to a slot.

As an example of a typical conference day, an opening “single speaker” Plenary could be scheduled from 9:00 to 10:00 A.M., a break from 10:00 to 10:30, and the morning concurrent sessions from 10:30 to 12:00, with resumption of the afternoon sessions at 1:30 or 2:00 followed by a possible second set of sessions at 3:00 or 3:30. The timing of Plenaries and sessions depends on the number of speakers and sessions.

The second of the two afternoon concurrent session spots on Day 2 of the conference proper (Thursday) is now being used to hold “Poster Sessions”, which have been very popular and very successful.

Another successful option is the “Roundtable Topic Lunches” Here as many tables as can be reasonably organized (eight to ten, usually) are established with a leader who will facilitate discussion on a chosen topic of current interest (participants typically sign up ahead of time for these tables, and leaders are asked to be well prepared). Setting up the Roundtables is a good example of the need for coordination between the Program Committee and the Local Arrangements Committee: the former is responsible for finding discussion topic leaders; the latter is responsible for finding tables (usually in the hotel or university, sometimes at local restaurants). These lunches usually are covered by the conference fees. In 2004, the Roundtables were held on Day One, and occurred during lunch at the conference site, which was covered by conference fees. The Roundtables could also be an opportunity for existing committees, action groups, interest groups, and planners of the next year’s conference to meet; but as discussed in section 5.1, it is preferable for separate time slots to be arranged for these meetings, in order to enable members to attend round-table discussions. A table was provided for first-time attendees (with “old” attendees at the table too, to make the newcomers feel welcome). Thus in 2004 there was no need for the PC to come up with topics or discussion leaders. The PC and LAC should coordinate each year to determine the character of the Roundtables (whether they are used for committees and groups, as in 2004, or for discussion topics, as at earlier conferences).

### **5.1.2 Organization of Social Functions**

Socializing has always been an important part of IASSIST conferences. The following is merely a suggestion and an illustration of what has happened successfully at past conferences for social events.

As mentioned above, a reception is usually scheduled for the night (Tuesday night) before the conference proper begins. Note that it might involve a tour of a local attraction and often has a local dignitary give a brief statement of welcome, followed by a welcome from the IASSIST President. Usually, podium and microphone are not required, but if the dignitary is, for example the Mayor of Amsterdam, extra considerations come into effect.

The second night of the conference (Thursday) usually has a longer social event with food and entertainment of some sort. Much of what is planned is dependent upon local facilities and budgetary restrictions.

Traditionally, the Thursday evening event is followed by the late night Turkey Action Group “meeting” which is convened in a hotel/university residence room at a pre-arranged time. New attendees of the conference should be told something of the origins and expectations of this unique action group but the coordination of this activity is not generally assumed by either the PC or LAC.

You can usually assume that most, if not all, conference participants will attend social functions. In recent years printed “invitations” have been used to control access to these

events. Organizers will have to keep in mind that some participants may want to bring spouses. If this is the case, it is appropriate to have a separate charge for the spouse to cover the costs of the event. This charge should be included on the conference registration form so the LAC will have an idea of how many extra people will attend.

Note that the above schedule leaves one evening free (Wednesday evening) for attendees to plan their own activities.

### **5.1.3 Meeting Organization: Administrative, Business, Wrap-up**

The Administrative Committee of the Association generally meets for a full day prior to the conference. The IASSIST Admin Committee will schedule this meeting at an appropriate time, usually the day before the workshops, and notify the local arrangements coordinator at the time that the scheduling of the conference takes place. Local Arrangements will need to locate and schedule a place for this meeting, which includes lunch for 15-25 people. Exact counts are provided by the President two weeks in advance of the meeting. As well, the LAC will print up the minutes and agenda for this meeting if they are given them in advance.

The Business Meeting, or General Membership Meeting, is usually held the second day of the conference during lunch. Food is provided by the conference as part of the registration fee and the meeting is generally held at the hotel or conference site. The LAC will print up the minutes from last year's meeting and the agenda. In 2006, the LAC requested the minutes for duplication early enough to insert into attendee bags. Several agendas were placed on each luncheon table. During the Business Meeting, Regional Secretaries and Action Group Chairs are asked to report on the past year's activities.

The Conference "Wrap-up" is held during the afternoon of the last day of the conference after the last of the concurrent sessions is over and before the start of the Post-Conference Outing, if there is one. Usually slides are shown. Sometimes songs are sung. The IASSIST Banner should be signed by the PC and the LAC before being presented to the organizers of the next year's conference. Gifts are sometimes presented to the major LAC volunteers.

## **5.2 A Further Breakdown of Activities**

### **5.2.1 Pre-Conference Events**

#### **5.2.1.1 Organization of Workshops**

Within a few months after the end of the previous conference a Workshop Coordinator, or Workshop Coordination Committee, should be selected to put together workshops, locate instructors, and consult with Local Arrangements as to what facilities will be needed. Facility availability impacts tremendously on what workshops can be organized and, because of the highly technical nature of some of the workshops, it is essential that a Local Arrangements person be aware of these requirements early in the planning stages of the Conference and make sure that the requirements are feasible to accommodate before the workshops are finalized. It is recommended that by the first of the year the workshops be set and facilities be agreed upon. The Workshop Coordinator needs to be responsive to the needs of the workshop instructors, particularly making sure that the proper hardware and software are available, and that workshop materials (handouts, etc.) are ready. As well, the Workshop presenters need to be sensitive to the needs of the LAC and make sure that they have the requirements for the workshop well in advance of the actual day and have assessed that the requirements are feasible before accepting a workshop proposal. They should also make sure that the software is tested prior to the workshop day so participants are not left hanging because there is no presentation to see and no activities to do.

Needless to say, attendance needs to be limited for some workshops (such as those taking place in computer laboratories). Therefore, sign-ups should be part of the registration process on a first come-first served basis, with early registration for workshops available only to IASSIST members. Waiting lists can be maintained to fill the spots of registrants who may cancel at the last minute. Workshop organizers should be given a list of names and addresses for those attending their workshops prior to the conference. The organizers may choose to contact attendees ahead of time to better determine ranges of participant interests and technical sophistication.

Refreshments are sometimes provided during workshops. In 2006, we gave workshop attendees bottled water, fruit, and packaged snacks.

### **5.2.1.2 Further Notes on the Administrative Committee Meeting**

The President and Vice President of the Association are responsible for setting the agenda for the Administrative Meeting. As mentioned before, the IASSIST Admin Committee will schedule this meeting at an appropriate time, usually the day before the workshops and notify the local arrangements coordinator when the scheduling of the conference takes place. It is essential the Admin Committee members, particularly those newly voted in, are forewarned that their presence may be required prior to the workshop day. Local Arrangements must be ready to assist the just-arrived committee members to find the meeting. During this meeting the Program Chair and the Local Arrangements Chair will be expected to deliver reports on the conference, and the latter should be prepared to present a current budget. This meeting is often used as a preparatory step to the General Membership Meeting, which usually takes place during the second day of the conference.

### **5.2.1.3 Early Registration Facilities and Information Services**

On the afternoon before the workshop day the LAC should set up a highly visible registration area of some sort, and staff it so that arriving participants may check in and receive their conference packets early if they so wish. It is helpful to include a “guide to the city” of some sort in the packets so that early arriving participants may familiarize themselves with their surroundings. Alternatively, in 2006, all workshop attendees were registered at their workshops and the general registration desk was open all day on Tuesday – the day of the workshops.

Effort should be made to notify delegates about registration facilities in advance of arrival as some will be staying in alternative accommodations. Many delegates download the registration information and location from the Internet, so detailed descriptions regarding registration should be posted on the conference site well before the conference begins. In 2006, walking directions/maps to registration and the workshops were left at the registration desks of the three hotels with the highest number of delegate bookings.

## **5.3 During the Conference**

### **5.3.1 Awards/Prizes/Gifts**

In the past there have been various sorts of “presentations” during the conference. Typically the President of IASSIST will initiate these. Small gifts for the LAC, local assistants, and individuals who have worked the registration desk have been given in the past, but this is

optional. This money is generally taken from the conference funds. Occasionally special awards for professional service (particularly at retirement time) will be presented during the conference. Again, these are generally initiated by the President. It is the prerogative of the President, the PC or the LAC to arrange gifts for special speakers (for example, an honored plenary speaker). If conference funds permit, prizes may be purchased for a raffle for attendees who turn in a conference evaluation form.

### **5.3.2 Social Activities**

As stated in other sections of this handbook, the conference planners generally plan social functions for participants. Effort should also be made to make available information on other sorts of activities as appropriate. A list of restaurants, bars, pubs, local attractions, movie houses, theaters, exercise facilities, and shopping areas should be included in the conference packet (see Content of Conference Materials, Participants Packages). LAC people, and particularly registration desk helpers, should be prepared to answer a wide variety of questions concerning the area.

## **5.4 Post-Conference**

### **5.4.1 Planning a Post-Conference Outing**

The PC and/or the LAC may decide to organize a post-conference outing. This decision is based on the amount of effort planners are willing to contribute and the area's offerings. A post-conference excursion is a good way of continuing the informal networking of the conference in a relaxed atmosphere and also allows members to get to know each other socially. More information on this is provided in [section 5.6.7.5](#).

## **5.5 A Description of Program Committee Responsibilities**

### **5.5.1 Selecting a Program Chair and a Program Committee**

As stated earlier, the Local Arrangements Chair is usually in place a number of years prior to the conference, while the Program Committee Chair is often not chosen until the time of the preceding year's conference. It may be that it is appropriate for the original Local Arrangements Chair to become the Program Chair and a new Local Arrangements Chair would be appointed at this stage.

Because the two Chairs must work so closely together it is sensible that the Local Arrangements Chair be involved in the choice of the PC Chair. The Program Chair needs to be willing and able to take on a very large task that will require the dedication of much time (at times this will seem like a second full-time job) as does the Local Arrangements Chair. Other "job requirements" include a high level of organization, the ability to make decisions quickly and to respond in a timely manner, and last, but not least, the capability to communicate, delegate, and motivate all Committee members.

The Program Chair is responsible for choosing members of the Program Committee, deciding its size, how it will function, and assigning responsibilities to its members. The PC Chair may call for volunteers from the IASSIST membership, if desired. As stated earlier, it is essential that the Chair include members from countries other than where the conference is to be held in order to encourage participation by non-nationals. Certainly the advent of e-mail has made organizing a conference immeasurably easier simply because it puts the Chair in nearly instantaneous contact with PC members.

Setting up a listserv that combines Program and Local Arrangements groups, as well as other interested individuals, is a must. The “confplan” listserv is managed by Chuck Humphrey at the University of Alberta, and can be used by each year’s LAC and PC if desired. The PC or LAC Chair should contact Chuck with a list of e-mail addresses to be added to the list, and should also request that e-mail addresses from previous years be deleted from the list (unless, of course, those members are serving again on the LAC or PC). The President and Vice-President of IASSIST should also be included on the conference planning listserv, as well as should the past PC chairs, who are considered advisory members of the next year’s PC. The conference Web site can also be used as a means of communication and planning for the PC members.

In recent years, several specific coordination activities have been identified and coordinators named as part of the Program Committee to handle those activities:

### **5.5.1.1 Plenary coordinator**

A number of Program Chairs have found it useful to have the plenaries planned by a Plenary Coordinator, usually named a year before the conference dates. This person has the responsibility of identifying strong plenary speakers, inviting them to speak, making sure they are aware of the policies regarding registration (they receive no funding but may attend the conference the day they speak and participate in all social events that day), encouraging them to attend the entire conference, finding out their technical requirements for the presentation, and greeting them the day of the plenary. Plenary Coordinators also identify and enlist people to introduce the speaker(s) and launch the morning plenaries (i.e., chairs for the sessions). The Plenary Coordinator must work very closely with the Program Chair since some of the presentation proposals may be good plenary material. Since plenaries are very important to the success and tone of the conference, this work needs to begin early and be attended to carefully. It is a big responsibility.

### **5.5.1.2 Sessions coordinator**

Another useful position to fill is that of Sessions coordinator. This person has the responsibility of organizing the details of the sessions (largely focused on recruiting and organizing session chairs) once the program has been put together. In the past, such responsibilities have included finding someone to chair sessions that have been created from individual papers, collecting technology requirements, helping with room assignments and space planning.

### **5.5.1.3 Poster session coordinator**

The Poster Session coordinator serves as an intermediary between Poster Session presenters, the Program Committee and the LAC. Functionally, the coordinator maintains a roster of presenters and elicits their needs for the session, identifies the available local resources and poster venue from the LAC, and communicates what is available and what is requested between the LAC and presenters.

### **5.5.1.4 At-large members**

In addition to the above, the Program Committee tends to have several at-large members who are called upon to assist in planning of the program. In 2009, it was found that these members were most engaged and productive when given discrete roles on the committee at the outset. Some suggested roles are outlined in [section 5.5.2.2](#).

## 5.5.2 General Chronological Order of Program Committee Activities

As will be seen, the Program Chair and the PC must move into action soon after the finish of the preceding year's conference. The Chair and the Committee should be in place and active by July in order to meet early mailing deadlines and to begin to put the program together. It is of great benefit if the Program Committee can physically meet one or two times during the early conference planning stage, and other events such as the ICPSR biennial meetings and APDU should be utilized to bring the Program Chair and other interested individuals together for discussions.

### 5.5.2.1 Pre-Conference Emails, Proposal Submission, and Web Site

"Mailings" are now typically done via e-mail, with no print counterpart mailed. Typically, but not always, the Program Committee is responsible for the pre-conference electronic mailings (occasionally the Local Arrangements people will assume responsibility for these). It is recommended that three such mailings be done, if possible:

- A Call for Papers and Conference Announcement emailed in the late summer or early fall preceding the Conference (See sample of Web page call for papers, [Appendix 2](#))
- A Program Outline and Conference Information emailed in January
- Registration Information and Preliminary Program emailed in March (See sample of Web registration form, [Appendix 1](#))

The rationale behind the timing of these mailings is as follows: The first mailing is a request for paper proposals and presents deadlines for the submission of proposals and for Committee notification of acceptance. The contents of the proposals should be specified (for example, a preliminary title and a 200-word abstract should be required), submission guidelines should be provided and e-mail addresses or a web site (if a web submission form is used) furnished. This first mailing also serves as a reminder for people to make note of the conference dates on their calendars. It typically has a list of suggested topics for presentations and a brief description of the conference site as well as information about IASSIST and membership. Names of individuals serving in the Program and Local Arrangements Committees may be provided, as well as contact e-mail addresses for more information.

In recent years, some Committees have asked for submissions (for papers, sessions, posters, and/or workshops) via a web form instead of/in addition to submission to an email address. The main advantages of using a web form are: a) the committee can control the structure of the information provided and more easily require the inclusion of certain items and b) submissions can be stored in a database and output in spreadsheet format for review by the PC (as opposed to PC members having to manually cut/paste information from emails into a cohesive document). After the PC had organized all submissions into a program in Excel, a PHP script was used to produce html files for publishing the program on the web.

The web form in 2009 fed information into a MySQL database and automatically generated a reply to the submitter with the content of his/her submission. See [Appendix 17](#) for an example of fields in the form; one notable inclusion was a list of topical keywords from which submitters chose to categorize the topic of his/her submission; these keywords then were used by PC members to evaluate and organize the proposals. Note: When the deadline for proposal submission passes, the web form should be disabled to avoid receiving late submissions.

After the PC has been working to compile the program, a second e-mail often is sent to the IASSIST list after the first of the year, and is timed to remind people about the conference and "encourage" them to plan for travel in their budgets if they have not done so already. In some years it has contained the theme and a very preliminary "skeletal" program (i.e., workshop, session and plenary titles, but typically no names of presenters or paper titles), and it may

encourage further submissions for presentations if that is necessary. However, in other years, this email was sent only when the program was complete. Either way, it should have the Web site URL of the IASSIST conference, give basic cost information for registration and hotel, and provide a few links to Web pages giving a brief history or background of the city in which the conference is held. The mailing should also provide pertinent names and email addresses, and additional non-conference specific information as necessary. This should go out to all IASSIST members and any relevant listservs (see [Appendix 7](#)).

The third e-mail, now usually done in March or early April, is used to present a more or less “finalized” version of the program with titles of papers and names of presenters where possible (if not already previously advertised), as well as a finalized version of social events. It should contain a registration form for the conference and information on how to book hotel accommodations, plus all relevant phone numbers. It should present any travel information necessary for arriving members (i.e., airport limousines, buses, location of hotel and so forth). It may also contain booking information for the Post-Conference Outing.

Each of these announcements should be posted on the Web site for the conference. Lastly, note that the timing of all of these mailings should be adjusted to suit the needs of the LAC and PC (so that they have ample time to do their work) and may be influenced by local circumstances (e.g., in 2009, the registration deadline had to be earlier than in years past to accommodate a relatively early deadline for booking hotel rooms).

### **5.5.2.2 Putting the Program Together**

Certainly every Chair has his or her own way of forming the program. Program Chairs need not depend solely on paper proposals sent in response to the first mailing for the content of their program. Sometimes the number of proposals received is not sufficient to fill the program, and sessions and their speakers are generated via the efforts of the members of the Program Committee and other individuals who have been encouraged to present ideas for sessions, panel discussions, plenaries and workshops. The PC can also work with proposers to flesh out tentative ideas for sessions. The utility of the general membership and the specific conference-planning listservs cannot be overstated, both as fertile ground for gathering topics of potential interest that might be pursued, and for discussing ideas about specific sessions and identifying possible speakers. Through whatever means possible the Program Chair should have a “well-formed” program by January, meaning that session chairs, workshop instructors, and all major speakers (particularly Plenary) are identified in time for the second mailing, and in time to locate any holes that may yet need to be filled.

As far as the content of the program itself, there have been variations over the years concerning conference structure, such as the maximum number of sessions to run concurrently, length of sessions, numbers of speakers per session, and so forth. The normal routine is to have three concurrent sessions. The planners should avoid packing too many speakers in too short a time (rule of thumb as stated above: 15 minutes per presentation with 15 minutes left at the end for discussion); as stated earlier, this generally can be accomplished with 3 speakers in a 90-minute slot or 4 speakers in a 120-minute slot, given the realities of the need for transition time between speakers and buffer time in case anything goes wrong (i.e. don't expect one speaker to be able to start up immediately after the conclusion of another). It may be useful to try having thematic “tracks,” for example, a technology track, a library issues track, and a data/documentation track running as concurrent sessions; however, keep in mind that this method requires a high level of crafting and coordination of the program on the part of the Committee and may not necessarily be feasible given the topics individuals want to present in a given year. Another tip is to consider using some panel sessions or other more interactive formats that promote audience participation. The best advice is to do the best you can and watch out for the obvious pitfalls like scheduling a person to be two places at once (or scheduling them to speak on a day that they cannot attend!), last-minute withdrawals

(they will always happen!), or concentrating too much on one particular area of interest (variety is the spice of life).

Putting together a program can feel like putting together a puzzle: making ideas fit with chairs, organizing speakers into sessions, filling gaps in the program, etc. The Program Chair may find index cards, although old-fashioned, useful in assembling the pieces of the puzzle. The PC is urged to make use of any fortuitous meetings where a group of IASSIST planners can get together and talk. Getting feedback from people who have put together successful IASSIST conferences in the past is strongly encouraged.

As described in [section 5.5.1.2](#), the PC Chair may wish to designate a member of the PC to coordinate the concurrent sessions. The primary responsibilities of the Concurrent Session Coordinator are to communicate with session chairs on logistics of the sessions, obtain presentation abstracts and presenter biographies for the program, identify technical requirements for presenters, and ensure that session chairs complete the session evaluation forms and that presenters receive notice about publishing in the IASSIST Quarterly. (See sample materials in this manual: Appendices [4](#), [6](#), [12](#), [13](#) and [14](#).) If the PC Chair so desires, the Concurrent Session Coordinator may also assist with drafting the concurrent session schedule and session titles (or this can be done by at-large members; see below).

In 2009, the Program Chairs utilized a new system for involving the at-large members in the planning of the program (focused on the concurrent sessions), considering how they could group together activities into roles for which members could volunteer. Giving each member a discrete job proved to be a highly effective way of distributing the work and engaging all members of the committee; and deciding upon roles at the outset (as opposed to soliciting at-large volunteers for tasks throughout the year) helped to make clear everyone's responsibilities going forward. Following is the example of the different roles played, but duties listed here could feasibly be grouped into alternative constellations, depending upon the number of at-large members and their skills and interests.

Potential at-large member roles (note: each could be played by one or more people, depending upon the composition of the PC):

Web Manager (often a joint project between the PC and LAC)

- Design (in consultation with the Program Committee) and manage the online proposal submission system.
- Coordinate reporting of submissions to the group for their evaluation
- In conjunction with the LAC, lead the work to get the final program up on the web

Primary information contact:

This person serves as the main point of communication with individuals who submitted a proposal. This responsibility largely ends in mid-spring when the chairs will take over in leading communication in the spring, but some post-conference follow-up may be needed. Involves:

- monitoring the conference email account and answering any questions that come in (and/or bringing appropriate questions to the group)
- reviewing the proposals as they come in to make sure they have complete and understandable information: e.g., clarifying any uncertainties, making sure the abstract is 200 words, etc. Might work with web managers on this, both on being able to view the proposals and updating them if any additional info. is received from the submitter
- once the decisions have been made, sending the acceptance/rejection letter to all submitters (and ask any follow-up questions as necessary).
- in coordination with the chairs, do post-conference follow-up as necessary

Evaluating submissions

- Once the all proposals are received and complete, this person reads over the proposals for papers and sessions and evaluate their appropriateness for the conference.
- At minimum, groups them in categories for definite yes, maybe, and no, but could consider other criteria as well (e.g., a balance of different topics).
- Note: the conference at times is in the position to accept virtually all proposals, but regardless, this helps to have someone take an initial pass at evaluation.

Group the individual papers into sessions

Once the evaluations are done (and maybe tentative decisions about acceptances have been made), this person would take only the proposals for individual papers and work to group them into sessions on cohesive topics.

Organize all sessions into slots into the schedule

Once the above is done, this person takes all sessions (both ones proposed as sessions and ones pulled together from individual papers) and arrange them into slots into the schedule. This involves:

- Considering what sessions would be good ones to occur opposite each other at the same time, given attendees' different interests
- Making sure that no one is double-booked for the same time (as either speaker or chair)

Other miscellaneous tasks for which you will want to secure volunteers

- Type up and report on evaluation forms after the conference
- Coordinate lunch round tables

The Program Committee chairs can thus serve as the thread that ties all activities together, reviewing the work of each member and ensuring appropriate handoff to the next member in the sequence. Again, it is advised that all anticipated responsibilities be assigned to some member of the committee, because those not squarely on some member's plate may accidentally be forgotten. Note that the sequence used in 2009 by the Program Chairs was to a) select a certain number of at-large members of the PC, b) asked them to consider what roles they wanted to play and rank their top 3, and c) matched members with roles considering their interests and skills. One might want to alter this order (i.e. recruit members for the PC explicitly to play a certain role) in circumstances whereby that role requires a specific skill set (e.g., creation and maintenance of a web form and database for submission of proposals).

In 2006, the Program Committee used an Excel spreadsheet to record session titles, presenters, abstracts, technical needs, etc. The PC passed the spreadsheet to the Web site developer, who created HTML tables with the spreadsheet information. The program information was updated on the Web weekly. When the initial program was in place, responsibility for updating the spreadsheet was transferred to the Concurrent Session Coordinator, who then passed the updates on to the Web developer via the spreadsheet.

In 2009, the Program Committee found it helpful to establish a wiki (in this case a Google Group, but any comparable system with shared editing privileges could be used) for communication among the Committee and storage of shared documents. The site included a) web pages with information for/decisions by the committee (e.g., local facilities, volunteers for posting the call for papers to different lists, roles of PC members, brainstorming of session titles, timeline, and to-do list) and b) a section for storage of files (e.g., call for papers, conference submissions, spreadsheets for doing groupings of papers, program schedule, etc.). This proved to be particularly effective for shared editing of documents, rather than emailing

different versions back and forth among the committee, which can lead to version confusion. This year a web form for proposal submission was used, which generated Excel reports loaded onto the wiki. PC members then utilized spreadsheets on the wiki to evaluate those submissions, group them into sessions, and create an overall schedule, which was then passed onto the LAC for publication on the web.

In addition to Workshops, Plenaries, and Concurrent Sessions, the Program Committee must also occupy itself with organizing the Roundtable Lunch, if there will be one. A Roundtable Luncheon consists of 8 to 10 tables of individuals, each discussing a pre-arranged topic. A call for Roundtable topics should go out to the general membership sometime in the early spring, and leaders should be chosen soon afterwards. They should come well prepared to initiate the discussion and keep it moving; minimally with outline in-hand, or ideally with handouts to distribute. The individual in charge of organizing the Roundtables should work with Local Arrangements to establish the number of tables available/needed and the type of food service desired, as well as how to determine if and how participants will be charged for their lunches. Because seating is limited, sign-up sheets for participation should be available at the registration desk at the start of the conference, and reminders should be given during the general announcements made prior to morning plenaries. The Roundtables usually look after themselves and need little organization. As noted above, the 2004 conference did not follow this format; rather, Roundtables were used for meetings of committees, interest groups, action groups, 2005 conference planners, and new attendees.

### **5.5.2.3 Poster Session**

The Poster Session idea is based on an A.L.A. concept (see [Appendix 8](#)), and its intention is to offer a way for a member to exhibit something beyond merely presenting it in a regular conference session. Poster Sessions lend themselves particularly well as an alternative format for what have been called “show and tell” papers--papers that offer solutions to particular problems, display major projects, or present unique software or hardware. Typically, the Poster Sessions include computer presentations and demonstrations so there is a demand for access to computers, network connections, and even computer projection facilities. Therefore, a space with multiple network connections and numerous tables will be needed for the poster sessions. Sometimes a table is set up and a backdrop provided for displaying information. The A.L.A. guidelines are a useful starting point for thinking about IASSIST poster sessions. They suggest that a logical sequence should be evident in the backdrop poster display showing introduction, development, and conclusion panels. The presenter is required to remain at the display to answer questions, and it is recommended that a sign-up sheet be provided to record the names and addresses of visitors who may want further information. To help the session run smoothly, one person should be put in charge of the afternoon of Poster Sessions. This person will be the Chair of the Poster Session and will stay in touch with poster presenters, help determine their equipment and space needs, list the presentations for the Web site and printed program, and make arrangements with the LAC.

It is up to the PC and LAC as to what extent hardware will be provided for presentations. It is sensible and increasingly common to encourage speakers to bring their own hardware. It is worth approaching local hardware manufacturers and vendors to ask if they are willing to lend equipment in return for publicity and a “shop window” for their products. Renting computer equipment is very expensive, and Murphy’s Law is generally in effect (what can go wrong will go wrong). If the organizers do intend to provide access to hardware it is recommended that a capable individual (or two) be given the responsibility of set-up.

Following is a suggested workflow of tasks for the Poster Session Coordinator:

To the extent possible, the coordinator should work with the committee to allocate at least 90 minutes, and up to two hours, for the poster session, and to avoid concurrent scheduling of interest groups and committees.

When poster submissions have been received by the Program Committee, the coordinator will create a list of participants and keep it updated; in some cases, prospective session participants who don't fit into any session may be offered spots in the poster session. Similarly, the coordinator may review the prospective sessions and suggest to the committee a poster that may fit into a session that is short on participants. Any withdrawals who directly contact the coordinator should be communicated to the committee, as should requests received after the close of abstract submissions.

The coordinator should contact the LAC soon after the close of submissions with a count of participants, and obtain a list of available resources (tables and poster displays by dimension, internet access, power outlets, and monitors) and a description or layout for the area the poster session will occupy. A sample of the initial query letter sent to poster submitters should be provided to the LAC, and modified as they suggest.

The initial acceptance letter may be sent by either the coordinator or program committee. If sent by the committee, it should be followed up shortly afterwards with the sample letter requesting poster needs. Ultimately, you will need close to a 100% response rate, since the LAC usually needs to order resources well in advance. This may require 4 to 5 follow-up emails in some cases. Maintain the list of requested resources in a spreadsheet with notations for special requests - placement near another presentation, need for a monitor, etc. Notify whoever is maintaining the conference web site of changes in participants, titles, or abstracts.

If a layout of the poster area is available (e.g., a floor plan with dimensions), create a preliminary mockup of where posters/tables/displays will be located and oriented and provide to the LAC for feedback. As possible, keep requested presenter together. As it is finalized, provide it to the poster participants as well. On finalization, submit floor plan, full list of participants and all needed resources to LAC.

At conference, make sure that poster session is announced, and enlist assistance in shepherding potential attendees to the event.

After the conference, solicit copies of posters or links to demonstrations from presenters, if they are to be posted on the conference web site.

#### **5.5.2.4 Communications with Chairs and Speakers**

Once a session or plenary has been organized the Program Committee should be able to rely on the session chairs as a direct route of communication with speakers. Sometime in January or February the Program Chair, or a designated member of the Program Committee such as the Session Coordinator, should recruit and contact all session (including plenary) chairs via an email that contains pertinent information such as the title, date and time of their session, its speakers, and their paper titles (See [Appendix 4.1](#)). Session chairs should then confirm with their speakers that all this information is correct (See [Appendix 4.1](#) for a form letter that each chair can send to his/her speakers) and that there are no problems such as speaker unavailability, scheduling conflicts, changes in information for the program, and so forth; response to this mailing often is tied to a deadline (set by the LAC) for finalizing information for the printed program. This first informational "mailing" to session chairs should include general instructions for chairing sessions, and should also contain copies of IASSIST's "Notes for Speakers" which the chairs should then forward on to the speakers in their sessions (See [Appendix 5](#)). At this time chairs should be instructed to obtain abstracts of papers if they have not already been received and to obtain requests for equipment their speakers may need.

Historically, communication with the workshop and poster presenters have been done by the Workshop and Poster Coordinators, respectively, separate from the communications that get sent via the session chairs.

In May, a second mailing to session chairs and their speakers should go out with final information on preparations and expectations for the conference, along with any other information that may be useful or necessary to circulate.

Much of the rationale of these mailings is to promote enthusiasm for the conference, as well as to keep people who will be responsible, in part, for the success of the conference, well informed.

### **5.5.2.5 Conference Registration Package Materials**

The Program Committee is responsible for getting the information for the final program to the Local Arrangements people in time for printing. The PC is also responsible for providing the Local Arrangements people with abstracts for all of the sessions that should then be printed in a separate volume and included with the program. The program should be as correct as humanly possible and should have names and institutional affiliations of all speakers, chairs, roundtable leaders, and workshop instructors. The final program should also list the names and institutional affiliations of the Program Committee, Local Arrangements Committee, and any other individuals who have assisted with conference planning. The Conference Web site may contain the full program and abstracts, which can be downloaded and delivered directly to the production staff for publishing. The LAC should contact local visitors' bureaus or other tourist information centers for maps and other useful items to include in the conference package. These are often distributed free of charge.

## **5.6 Description of Local Arrangements Committee Responsibilities**

### **5.6.1 A General Chronological Order of Local Arrangement Committee Activities**

Note: The LAC chairs from previous years are excellent sources of information. If they cannot answer your question, they will direct you to the person who can. So please use them!

#### **5.6.1.1 Conference Site**

The very first thing the LAC should do once the conference dates are established is to secure a conference site by contacting potential hotels and conference venue sales staffs, and make site visits in person. Some major hotels are booked up to five years in advance, and finding suitable sites must be done before anything else. Once these sites have been identified other IASSIST members (the President, Administrative Committee, and so forth) can be consulted to assist in a final decision.

As soon as the conference site is decided upon, the LAC should begin investigating suitable venues for all social events including catering and transportation. Initial contacts can be made via telephone or correspondence, and followed up with an in-person site visit by the LAC. Once final decisions are made, a contract should be signed by both the LAC and the party rendering the service(s). Monthly follow-ups should be made by the LAC with everyone who is supplying a venue for a social event. It is the responsibility of the LAC for the event to run smoothly, and it is not safe to assume that those rendering services know what the LAC wants.

The LAC should identify and make use of local organizations that may be of help, such as Visitors' Bureaus and campus-based departments that specialize in conference planning. They

may have information and resources that can be of tremendous assistance. They may also be able to negotiate better prices with hotels.

It is a good idea to keep a couple of alternative plans in the background just in case of emergency. If the venue for the reception should burn down the week before the conference, you will need to keep a clear head and put alternative plans into action.

### **5.6.1.2 Logo**

At an early stage in the planning the LAC should have a logo designed if it decided that one should be used. A logo is useful for instantly identifying a document as belonging to the conference. If a multi-colored logo is chosen, it will be necessary to have produced several camera-ready copies of the logo with color separations as that is what most manufacturers and producers of such goods require. However, for a single color logo, a good quality laser printed copy will be sufficient for the manufacturers. Note that a multi-colored logo should also print well in black and white. The logo will be used on the Web site and on conference materials (bags, t-shirts, printed material, maybe even the banner).

### **5.6.1.3 Emails and Ordering Materials**

By late summer or early fall before the conference, the Call for Papers should be sent out, to be followed in January with the Program Outline and Conference Information, and in March with the Registration Forms and Preliminary Program. These materials should also be posted on the conference Web site. Again, the PC and LAC need to work closely to coordinate these activities. Plans for ordering t-shirts, bags, and other materials should be done at this early stage also, though the actual placement of orders for these materials will need to happen considerably closer to the launch of the conference once there is some indication of how many delegates will be attending. The LAC should examine the lead times (internal and manufacturer) needed to produce all conference materials and ensure that registration deadlines are set accordingly to produce an accurate forecast of attendance to ensure enough materials are available.

### **5.6.1.4 Details**

By April prior to the conference all local arrangements must be in place. At this time - now that the groundwork is laid - the details will begin to surface. Examples of these "details" include things such as procuring or creating informational and directional signs if needed, arranging for contingency situations such as last-minute photocopying, ordering flowers, etc. You may be lucky enough to be able to arrange prior access to hotel keys the weekend before the conference so that needed materials can be set up. However, you may not get access to the rooms until the first morning of the conference. Unless you have local accommodations very close to the hotel, it makes good sense for the Local Arrangements Chair to stay in the hotel during the conference. Try to have the hotel provide you with a workroom that can be locked.

By mid-April it is a good idea to mentally "walk through" the entire conference with a knowledgeable third party so that any inconsistencies in scheduling or any omissions can be spotted and rectified. By May 1st everything should be nailed down as tightly as possible. This is particularly important because, as the conference draws near, unexpected problems will arise that may take up much of the LAC's time.

### 5.6.1.5 Sample Timetable and Task Assignments for LAC Activities

The following timetable and assignments were based on the 2006 conference in Ann Arbor, Michigan.

Spring 2005	<ul style="list-style-type: none"> <li>• Contact potential co-hosts and get their agreement to help with the conference</li> <li>• Identify members of the LAC committee</li> <li>• Book meeting rooms and hotel blocks</li> </ul>
May 2005	<ul style="list-style-type: none"> <li>• Submit bid to host conference</li> </ul>
June-July 2005	<ul style="list-style-type: none"> <li>• Hold first planning meeting of LAC</li> <li>• Set future LAC meetings schedule (monthly until April is reasonable)</li> </ul>
	<ul style="list-style-type: none"> <li>• Create initial conference plan (some content can be pulled from bid document) and prepare separate spreadsheet with cost estimates for 150, 200 (and 250?) registrants. Include the following: <ul style="list-style-type: none"> <li>○ Official co-hosts</li> <li>○ LAC members</li> <li>○ Housing options with number of rooms and prices</li> <li>○ Dining and meeting facilities, capacities, and prices, including reception, banquet, lunches, breaks, breakfasts (optional); include per person costs when applicable</li> <li>○ Equipment overview and prices (laptops, projectors, microphones, network access)</li> <li>○ Registration arrangements (where and who will staff)</li> <li>○ Transportation options (to social events if needed)</li> <li>○ Arrangements for conference Web site and printed program</li> <li>○ Staffing estimates</li> <li>○ Ideas for bag contents and estimates</li> <li>○ Workshop arrangements (computer lab space for three concurrent labs, morning and afternoon)</li> <li>○ Proposed conference agenda for the week of the conference</li> <li>○ Post-conference excursions</li> </ul> </li> </ul>
August 2005	<ul style="list-style-type: none"> <li>• Designate liaison to Program Committee and Outreach Committee</li> <li>• Decide on entertainment options and book entertainment</li> <li>• Review prices for banquet and book caterer</li> <li>• Decide on logo</li> </ul>
September 2005	<ul style="list-style-type: none"> <li>• Decide on excursions and book them</li> <li>• Set conference fees, including single day, student rate, early registration fees</li> <li>• Draft Web site text and review it; implement draft of site</li> <li>• Create online proposal/paper submission form</li> </ul>
Early October 2005	<ul style="list-style-type: none"> <li>• Announce Web site with submission form concurrently with Call for Papers</li> </ul>
Mid to Late October 2005	<ul style="list-style-type: none"> <li>• Design online poster for printing (PDF) describing the IASSIST conference and post to the site</li> <li>• Make LAC individual task assignments - see below</li> <li>• Create list of potential sponsors</li> </ul>
November 2005	<ul style="list-style-type: none"> <li>• Book transportation to banquet and excursions, if applicable</li> </ul>
December 2005	<ul style="list-style-type: none"> <li>• Set sponsorship levels and packages of services</li> <li>• Send first communication to potential sponsors; follow up as needed; add text to Web when confirmed</li> <li>• Explore caterers for reception</li> </ul>

	<ul style="list-style-type: none"> <li>• Prepare mockup of registration form (to go live February 1); review mockup; when final, send for programming</li> </ul>
January 2006	<ul style="list-style-type: none"> <li>• Finalize speakers for reception</li> <li>• Finalize post-conference outings</li> <li>• Finalize and test registration site</li> <li>• Program Committee begins to build program with titles, speakers, abstracts using a spreadsheet</li> <li>• Transfer preliminary program information to Web</li> <li>• Workshop Coordinator finalizes workshops and technical needs</li> </ul>
February 2006	<ul style="list-style-type: none"> <li>• Add room location information to program on Web</li> <li>• Finalize room setups and catering menus with conference venue; send them a schedule of events</li> </ul>
Early March 2006	<ul style="list-style-type: none"> <li>• Sessions Coordinator sends first chair letters with deadline of mid-March for program changes</li> </ul>
Mid March 2006	<ul style="list-style-type: none"> <li>• Finalize program on Web as much as possible; PC announces program</li> </ul>
Late March 2006	<ul style="list-style-type: none"> <li>• Secure tables and poster boards for poster session</li> <li>• Get local maps, write descriptive content for printed program</li> </ul>
Early April 2006	<ul style="list-style-type: none"> <li>• Program Committee sends message re program on Web</li> <li>• Finalize regular and Chair bag contents</li> <li>• Place order for t-shirts, bags, and bag contents</li> <li>• Get commitments for technical coverage of sessions</li> </ul>
Mid April 2006	<ul style="list-style-type: none"> <li>• Send reminder that early registration ends in a week</li> <li>• Print program covers and at-a-glance trifolds</li> <li>• Create registration desk staffing schedule and distribute</li> </ul>
Early May 2006	<ul style="list-style-type: none"> <li>• Finalize program content; send to printer</li> <li>• Confirm workshop venues and software setup; visit locations</li> </ul>
	<ul style="list-style-type: none"> <li>• Create signs</li> <li>• Create walking instructions to workshops if applicable</li> <li>• Create nametags</li> <li>• Duplicate materials for bags</li> <li>• Stuff bags</li> </ul>
Summer 2006	<ul style="list-style-type: none"> <li>• Update conference manual</li> <li>• Review conference and workshop evaluations</li> </ul>

### Typical LAC Assignments

#### *Sponsorships, bags, materials*

- Work with sponsors
- Order bags and other merchandise
- Coordinate bag contents
- Oversee design and order T-shirts
- Purchase and organize raffle prizes

#### *Events coordination*

- Coordinate with Turkey Action Group for meeting space and needs
- Organize the Tuesday reception
- Schedule rooms for sessions and determine rooms needs
- Organize entertainment for Thursday banquet
- Organize banquet menu and serve as liaison to banquet venue
- Enlist workers and organize registration desk workers

#### *Post-conference events*

- Set up events and make arrangements; determine prices
- Arrange transportation

*Technical arrangements*

- Coordinate with conference and workshop locations on technical AV needs
- Coordinate with poster session coordinator on poster session AV needs
- Setup and staff email stations
- Arrange for technical staff at each session

*Web site:*

- Build and maintain conference Web site and update it regularly
- Work with PC and Sessions Coordinator to ensure that information is up to date

*Liaison:*

- Coordinate speakers for Tuesday banquet
- Coordinate with Program Committee on room needs (space for sessions)
- Provide materials for program and other documents to editors
- Coordinate on outreach activities with Outreach Director

*Registration and other administrative tasks:*

- Order nametag supplies and print nametags for conference attendees
- Process registration credit card charges and take to ISR
- Output needed reports from registration system
- Coordinate registration desk staffing and materials

*Design and printing:*

- Design logo
- Design conference poster and post on conference Web site
- Produce printed program and other documents for bag
- Work on design for T-shirts
- Produce signage, maps, and directions

## **5.6.2 Dividing Areas of Responsibility with the Program Committee**

### **5.6.2.1 Web Site**

The design, production, and maintenance of the conference Web site is a major responsibility. It should be developed by a person whose single responsibility is collecting information from the LAC and Program Chair, and presenting it as quickly and carefully as possible. Constant editing is sometimes required if the planners are using the Web site to organize the sessions, chairs, and papers within the sessions. How these plans will be coordinated and how much the Web site will be used for internal planning can be decided by the particular conference planners. Note that not everyone will want to use the Web site in the same way. However, the most critical functions of the site are to promote the conference and to present clear and complete information about times, content, location, registration, lodging, travel, and contacts. As well, it is useful to have a FAQ page (Frequently Asked Questions).

In the past, registration was not typically accepted over the Web site since not every location was able to provide secure credit card information transfer over the Internet. Sometimes there has been registration over the Internet and then payment was either faxed or mailed to the conference registration service. This registration process went quite smoothly.

## **5.6.2.2 Mailings via Email and Registration Forms**

The LAC and PC should coordinate on timing and content of the three e-mail announcements. Details about the contents of the mailing are in the section above.

### **5.6.2.2.1 Registration and hotel reservations**

The registration form is made available on the conference Web site, even if online payment for registration is not available. The registration form should be in a “printable” format, in case no online registration is available or to provide an alternative for registrants who do not wish to register online.

The registration form should contain the official registration form for the workshops and the conference itself. Text should be kept to a minimum, yet still convey all necessary information. Fee categories should be written and designed so as to be clear and free of confusion. Deadlines and late fees must be boldly apparent. Workshop sign-ups should be provided with a clear description of the contents of the workshops and any attendance limitations. E-mail addresses, phone and fax numbers for the Program Chair and Local Arrangements Chair should be provided for further information. If possible, it is a good idea to set up an appropriate, easily remembered e-mail address where further information may be requested. Names and contact numbers of persons to notify in the event of an emergency may be solicited at the LAC’s discretion. Again, it’s a good idea to get a third party opinion on accuracy and clarity of this form.

A link to a hotel booking form that participants can return directly to the hotel may be included, if permission is secured from the hotel first; at a minimum, phone and fax numbers for the hotel should be supplied. It is highly recommended that the LAC encourage participants to make their own hotel reservations. The LAC may be required to assist the outreach participants and those who cannot afford the cost of the hotel site or who prefer a different type of accommodation, e.g., self-catering. It is a good idea to prepare a list of alternative accommodations, including YMCAs and so forth, and circulate information about the local Tourist Office Accommodation Service. There will also be those who book too late and may need assistance to make alternative arrangements.

### **5.6.2.2.2 Content of conference materials (participants’ packages)**

These are the materials that participants receive when they register. The LAC should have made arrangements for a folder or portfolio of some sort for keeping these materials together. These materials may include, but are not limited to:

#### **5.6.2.2.2.1 Participant’s package**

- Name tag, with a string, with large enough print to be easily read. This should also include the conference logo (if applicable), the institution and the country of the attendee.
- A general information handout welcoming participants and informing them about local transportation, who to see about problems or concerns that may arise, maps of the hotel, workshop site, city, banking and shop opening hours, postal charges
- Receipt for paid conference fees
- Conference Program
- Abstracts (both sessions and poster sessions/demos)
- Separately printed invitations to the social events

- List of participants - this will probably have to be reproduced during the conference for late registrants
- Conference Evaluation Form
- Brochure or guide to the city
- Restaurant list
- Pad of paper
- Pens, buttons, souvenirs are optional
- IASSIST Membership form

#### **5.6.2.2.2.2 Session chair package**

- Chair Report form(s) (not necessarily used; to be a decision of the PC in any given year)
- Information for Chairs handout, including a reminder to capture any electronic presentations from the presenter(s) for later posting to the digital depository on the IASSIST Web site
- "Time Cards" for session Chairs (if not left in the session rooms)
- "Authorization to Publish Forms" for the presenters to fill out if they know at the time that they will want to publish in IQ (see [Appendix 6](#))

#### **5.6.2.2.2.3 Evaluation forms**

Evaluation forms should be provided for both the individual workshops and for the conference in general. The LAC and PC should coordinate on the content of the evaluation form and should decide who will be responsible for tallying and reporting the responses. These forms should collect information on people's satisfaction with the content of the workshops, sessions and so forth, as well as solicit information on possible future topics---in this way the forms are of potential interest to the next year's conference planners. During the morning announcements each day, the evaluation forms should be mentioned and people reminded to fill them in.

It is a good idea to make up the two different forms a couple of months before the conference. During the few weeks prior to the conference, the LAC will be quite busy with many details and if the forms have not been composed by then, they will likely be forgotten. For IASSIST 2003 in Ottawa, most questions had a scale accompanied by write-in lines. This format appeared to work well with the conference participants.

The workshop evaluation forms should be handed out at the beginning of each workshop by a designated LAC member and collected immediately after the workshop. This ensures a good number of forms being filled out.

The conference evaluation forms should be included in the conference program, on a different color of paper to make them stand out. Extra copies of the forms should be available at the registration desk and an Evaluation Forms box, clearly labeled, at the registration desk. Examples of evaluation forms can be found in [Appendix 3](#). To encourage participation, many LACs have sponsored a raffle where winners were drawn and presented small prizes during the Conference Wrap-up Session.

Whoever collected the evaluations (LAC or PC) should tally the responses and prepare a summary, including synopses of the comments. Results should be reported to the next year's LAC and PC by the end of the summer following the conference, so that suggestions from the evaluations can be taken into account early in the conference planning process.

#### **5.6.2.2.2.4 Collecting conference electronic conference presentations**

The digital depository for presentations has become an integral part of every conference. At IASSIST 2003 in Ottawa, we kept a computer at the Registration desk for participants to deposit their presentations at any time during the conference. In this way, a database was

built during the conference and this was passed along to the appropriate person at a later date. In 2006, all presenters were asked to load their presentations on the laptops provided in the concurrent session rooms. At the end of the day, an LAC member collected all presentations off of the laptops and transferred the files to a common depository. It is very important that the chairs for each session ask every presenter to provide a copy of their presentation in digital form, either for the Web site collection of presentations or for publication in the IASSIST Quarterly. The designated method should be decided ahead of time and appropriately communicated to chairs and speakers.

### **5.6.3 Organizing Labor Prior to and During the Conference**

#### **5.6.3.1 Maintenance of IASSIST Member Database**

Since 1991 there has been in existence a database of names and addresses. This database is dynamic as new records are added and old records are deleted. Contact the Treasurer for information if a paper mailing is required or names and addresses are needed for other purposes. Conference registration databases are incorporated into the Membership Database as appropriate.

#### **5.6.3.2 Running the Registration Desk**

The Registration Desk should be staffed 30 minutes to an hour before each day's workshop and conference sessions, during the conference, and for approximately 30 minutes after a day's conference session. Participants will quickly come to expect that anyone staffing the Registration Desk will be able to answer their questions. Spare cash should be kept on hand for making change. Additional supplies include pens, paper, an accounting book of registration fees paid and pending, and extra registration materials. Have an extra supply of about 25 Conference Programs printed as these tend to be popular items.

It is imperative that the Registration Desk be staffed during breaks as this is where participants will go to retrieve any messages, sign up for Roundtable lunches, etc.

Organizers should note that they may need to hire students or other individuals to staff the Registration Desk. Often times these individuals can come from the LAC's work unit, or be recruited from the campus library or other similar places.

Another use for the Registration desk is to sell IASSIST T-shirts. These are always a popular item and people will buy them right up to the last minute of the conference. For this reason, it is recommended to move the registration desk to the outside of the Wrap-up room so people will readily be able to buy them. There may be some shirts left over and while it is up to the LAC to decide whether or not to put them on sale, they can always be carried over to the conference the following year and sold there. In 2006, we added the ability to purchase an IASSIST T-shirt on the registration form. Out of 255 registrants, 62 shirts were pre-ordered and we ordered another 33 shirts. All shirts were sold.

#### **5.6.3.3 Liaison with Hotel and/or Conference Facility**

The hotel or conference site contact person with whom the LAC has worked the past year may or may not be the contact person during the course of the actual conference. A good hotel/university will have a conference manager on site who is familiar with the conference schedule and who oversees room and food setup, audio/visual equipment, computer equipment, and so on. Do not assume, however, that this person exists. The LAC may have to stipulate in the hotel/university contract that a contact person be present during the

conference. Remember, your business is important to the hotel/university so do not hesitate to inquire about a contact person if none exists.

## **5.6.4 Working with the Meeting Place**

### **5.6.4.1 Establishing and Maintaining Frequent Contact with Meeting Center and Hotel Staff**

As mentioned before, it is up to the LAC to establish and maintain frequent contact with the Meeting Center's contact person. All of the arrangements may be perfectly clear to you, but you cannot assume that the contact person visualizes the conference as you do. They need to be kept informed of any change in plans, number of participants expected, and so forth. Keep in mind that they have other clients besides you, and frequent contact helps ensure that the IASSIST conference gets the attention it deserves.

### **5.6.4.2 Estimating Number of Rooms Needed for Guests and Meetings**

The contact person can help you plan for an adequate number of single and double guest rooms. Over-estimate the number of guest rooms needed to ensure that there will be enough. Large conferences are profitable for hotels and hotel staff should be willing to reserve a number of rooms at an agreed upon rate for a specified amount of time. The hotel may require a fairly early cut-off date for holding the allocation of rooms and this should be made clear in the conference registration information. It may be a good idea to reserve one or two guest rooms for the use of the Local Arrangements Committee so that they have a place to change, relax or even sleep.

The contact person will be more familiar with the hotel/university and will be the one to estimate the size of the meeting rooms. It is up to the LAC, though, to inform them of the schedule so that they have time for room set-up -- e.g., you will need to make it clear that the room required for Roundtable lunches should be entirely different from a meeting room used just prior to lunch. And you will also have to inform them that a plenary session requires a larger room than a concurrent session.

### **5.6.4.3 Layout of Meeting Rooms and Seating Arrangements**

The LAC needs to inform the contact person of seating arrangement needs and preferences. Generally, a classroom type of setup works best, but a contact person who knows the layout of the rooms may have other suggestions.

The IASSIST banner should have been passed on by the previous Local Arrangements Committee and arrangements must be made with the hotel/university in advance for putting the banner in a suitable, prominent place.

## **5.6.5 Determining Equipment Needs and Other Hardware Issues**

This is an area with which the LAC has to be completely familiar. Shortly before the hotel/conference site contract is drawn, a day-by-day breakdown of the conference schedule should be examined in excruciating detail by the LAC and the contact person to ensure that all equipment will be supplied and set up. Previous coordination with the PC is crucial here: the PC has to inform the LAC of any special needs such as projectors, chalkboards, etc. Usually

these are supplied by the hotel /conference site and there may be charges levied. If any item is not mentioned in the contract, it will not be provided. Typically a computer, network connections, slide projectors, microphones, overhead projectors, and writing boards of some sort will be needed, perhaps for each room. It is the PC's responsibility to encourage all speakers to make their needs known well ahead of time. Remember to make sure that extension cords and so forth are available from the hotel/conference site staff.

## **5.6.6 During the Conference: Requirements of Local Arrangements**

### **5.6.6.1 The Registration and Information Desk**

As mentioned above, it is essential that the Registration Desk be staffed before, during, and after conference sessions, especially during breaks. The people sitting at the Registration desk will be expected to know the answer to a question or know where to get it answered. It is a good idea to have at least two people on duty during the busy periods (before and after conference sessions and during breaks) as one of them will probably be running errands. During conference sessions one staff person may be enough to cover the desk, but this is really dependent on each situation. In 2003, we rented three cell phones for the duration of the conference: one was kept at the registration desk at all times; one was kept by the chair of the LAC; and the third one was kept by the LAC member in charge of the technical help. This proved to be very efficient in getting questions and problems resolved quickly. As well, each member of the LAC had a list of phone numbers (including the rented ones) so we were able to call for help immediately.

Besides being an information source, the staff sitting at the registration desk must keep up-to-date records on any fees paid during the conference, and any outstanding fees. It is inappropriate for the LAC to insist that any participant pay fees owed in full by the end of the conference when an invoice will suffice.

The digital depository for presentations has become an integral part of every conference. At IASSIST 2003 in Ottawa, we kept a computer at the Registration desk for participants to deposit their presentations at any time during the conference. In this way, a database was built during the conference and this was passed along to the appropriate person at a later date.

### **5.6.6.2 Keeping Time**

One of the most difficult things about scheduling an IASSIST conference is maintaining a steady pace. Sessions cannot run over or people will miss the networking conducted during breaks. For this reason it is necessary to schedule adequate time for the speakers, stick to the blocks of time allocated to each speaker, and give adequate time for breaks and lunches. Half hour breaks and one-and-a-half hour lunches have proven to be ample for keeping the schedule flowing. Nonetheless, someone will have to take charge of making sure that sessions start on time.

Session Chairs should keep track of time and it is the responsibility of the Concurrent Session Chair to remind them to do so. Cards are available for Session Chairs to use to notify a speaker of time remaining. This allows for the speaker to wrap things up if necessary, and for the audience to formulate questions if time permits. Pre-made time cards, showing "5 minutes left", "1 minute left", and "time", should be placed in each Chair Package, and each Chair should be given instructions about managing the session time. (See Responsibilities of Chairs, [section 5.6.6.5.](#))

### **5.6.6.3 Relaying and Providing Important Information**

Announcements, schedule changes, etc., should be announced by the LAC or the Chair of each morning's Plenary as that is about the only time all participants are convened in one place.

During the welcome speech it is useful for the President to identify individuals who can be of assistance. Those individuals (LAC, PC, etc.) should stand so they can be recognized by new participants who do not know them by sight.

### **5.6.6.4 Taking Care of the Registrants' Needs**

#### **5.6.6.4.1 Message board**

The registration desk is the most likely place a participant will go to for messages. Some sort of large board should be set up for participants to place and receive messages. The LAC should arrange for any messages received by the hotel front desk to be delivered to the conference registration desk for relaying to participants.

#### **5.6.6.4.2 Access to email**

The LAC should provide access to computers with email for conference participants. In recent years, participants were able to use nearby computer equipment in campus libraries. If there are no clusters of machines that visitors may use, the LAC may have to rent equipment and set it up in a room in the hotel/conference site.

#### **5.6.6.4.3 Emergencies**

The LAC should be prepared to handle any emergency, whether it be implementing a last minute change in plans for a social event, or arranging for an ambulance to take someone to the hospital. Above all, remain calm in the event of an emergency as it is the LAC who will be expected to coordinate any and all emergency activities. At the LAC's discretion the registration form can include a request for information about whom to contact in the event that a participant becomes gravely ill.

#### **5.6.6.4.4 Signs outside meeting rooms**

Signs should be posted outside all meeting rooms that give the room number or name, session title and time of each session in progress. Someone should be designated to change these signs before each session. Alternatively, signs can be made up for each day and then the signs are only changed at the beginning of each day. If there are two doors to a room, signs should be placed on each door. Remember, there can never be too many signs!

### **5.6.6.5 Responsibilities of Chairs**

An outline of Chair responsibilities should be sent to the Chairs via e-mail prior to the conference so they can plan their session and communicate important information to their speakers. A special Chair Packet containing the Chair Report form and "time left" cards should be given to each Chair when they check in at the Registration Desk.

In some years, the Chair for each session completed the Chair Report form describing the content and highlights of the session. These documents were collected at the Registration Desk and passed on to the Program Chair. In some years, these documents were useful for subsequent conference planners, as they indicate the number of attendees in each session.

However, in other years they were not used because the return on the investment of time (on the part of the chairs to fill them out) was seen as quite low. Therefore the PC in any given year should decide if any such form is necessary.

The Chair is also responsible for keeping time and having each presenter finish his or her talk within the allocated time frame. This is very important and cannot be stressed enough since all speakers must be given the fully allocated time. Chairs should receive full instructions in advance regarding these issues.

Another form in the Chair's Packet is the Authorization to Publish in *IASSIST Quarterly* (see [Appendix 6](#)). If any of the speakers have a paper ready to submit to the *IASSIST Quarterly*, the Chair should request that the presenter fill out this form and hand it in to the registration desk after the session is over.

## **5.6.7 After the Conference**

### **5.6.7.1 Minutes of the Conference**

While it is rare that Conference "Minutes" have been distributed, it is useful to ask one or more people to be responsible for posting an account of the conference on the IASSIST listserv for the benefit of those who were not able to attend. This could contain brief synopses of plenary speeches, descriptions of interesting discussions, Chair Report summaries, and so forth. The advantage of having this be a collaborative effort is obvious, since one person can not attend all sessions. (Note: this has not been done in recent years.)

### **5.6.7.2 Conference Proceedings on the Web Site**

In recent years Conference materials have been published on the conference Web site. This has included the finalized program, a list of participants, abstracts from papers and poster/demonstration sessions, and presenters' PowerPoint presentations. Session chairs should encourage presenters to submit their PowerPoint presentations to the Publications Committee (and the procedure for doing so should be planned in advance jointly between the PC and the Publications Committee). The Publications Committee follows up with speakers after the conference to solicit electronic copies of their presentations. In 2003, a "presentation depot" was set up at the Registration Desk so that presenters could drop off an electronic copy of their presentation. This could be done by having a computer available for copying the presentation files. File names should include the presenter's last name and the session number, at a minimum.

### **5.6.7.3 Papers for the IASSIST Quarterly**

The conference is an opportunity to solicit papers for publication in the *IASSIST Quarterly* and there should be mechanisms in communicating with presenters to do so. Historically, chairs have been asked to encourage speakers in their sessions to do so; those speakers who have decided to do so can then be given the opportunity to complete "Authorization to Publish" forms (see [Appendix 6](#)). And if hardcopy and/or machine-readable versions of papers already are completed, they can be handed over to the proper individual (typically the editor of the *Quarterly*). Moreover, chairs of a session may find it effective to acquire papers from all of the participants in their session for a special issue of IQ dedicated to a unified topic.

### **5.6.7.4 Conference Databases and Banner**

The database of names and addresses used for sending out the mailings should be maintained and updated before handing it on. Complete mailing addresses, with country, should be included. The database used for conference registrations may also be useful to the following year's committees.

The IASSIST banner should be signed on the back by the PC and the LAC and given to the organizers of the next IASSIST Conference.

### **5.6.7.5 Post-Conference Excursion**

This is an optional extra responsibility for whoever takes it on. Minimally, the LAC might provide participants with lists of suggested excursions. However, a post-conference excursion is a good way of continuing the informal networking of the conference in a relaxed atmosphere and also allows members to get to know each other socially.

Plans must depend on what the area has to offer. Ideally, a journey that gets to the destination in time for dinner is probably sufficient. Good local knowledge and contacts are the most important factors in the arrangements - take advice from anyone you know who is involved in arranging such events and go to visit any possible areas and, very importantly, the hotels or other possible accommodations.

Minimally, it is necessary to arrange transportation, accommodation, and itinerary. Transportation will depend on local circumstances but a coach from the conference venue direct to the destination, leaving shortly after the close of the Conference "Wrap-up", is probably easiest. It will be necessary to negotiate an acceptable rate with the hotel and to arrange for an allocation of rooms to be held for a suitable time. Make the plans for the itinerary as flexible as you can because different people will want different things from the excursion - sightseeing, relaxation, shopping, outdoor sport, etc.

The cost of the excursion should be calculated based on the minimum viable number of participants and it should be clear in the advance publicity exactly what is included in the charge. Delegates should be encouraged to book early and pay in advance. It is all too easy to change your mind if you have not already paid.

### **5.6.7.6 Finances**

It is possible that not all registration fees will be paid in full by the end of the conference. If this is the case, it will be necessary for the LAC to invoice participants for unpaid fees after first verifying with the PC and the President that this is appropriate. As soon as all operating costs have been paid for (late summer or early fall following the conference), a final budget report should be submitted to the President, Vice-President, and Treasurer of IASSIST. Any earned revenue should be sent to the IASSIST Treasurer after first conferring with the President.

### **5.6.7.7 This Handbook**

As stated in the Forward, it is the hope that this handbook can be continued as a living document, dynamically maintained by succeeding generations of conference planners. By keeping it current and recording recommendations it will continue to be a valuable tool to the organization and its volunteer work force.

## Appendix 1: Sample Registration Form from Conference Web site, 2004

### *Conference Registration*

The venue for the IASSIST 2004 conference is the [Pyle Center](#) on the University of Wisconsin – Madison campus.

The fee structure for the conference is listed below:

All fees are in US Dollars.						
IASSIST Activity	Member		Non-Member		Student	
	Before April 24	After April 24	Before April 24	After April 24	Before April 24	After April 24
Per workshop	\$50	\$75	\$50	\$75	\$50	\$75
Full conference	\$275	\$325	\$350	\$400	\$150	\$180
One-day conference	\$150	\$200	\$200	\$250	\$80	\$100

Currency Converter: <http://www.xe.com/ucc/>

Attendees wishing to pay by credit card (Visa or MasterCard) may [register online via secure server](#).

Attendees wishing to pay by check or money order (in US dollars, payable to **UW Extension**) may [download and print out a registration form](#) (in PDF).

Registration FAX number: (608) 265-3163

Or MAIL to the following address:

IASSIST  
 Attn: Gloria Eichenseher  
 702 Langdon Street, Room 139

Madison, WI 53706

For registration information contact:

Gloria Eichenseher, (608) 265-2955, [eichens@ecc.uwex.edu](mailto:eichens@ecc.uwex.edu)

REFUND POLICY:

Registrants who cancel on or before April 24 will receive a refund of the total amount paid less a \$30 US administrative charge. Registrants who cancel after April 24 will NOT receive a refund.

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The IASSIST Outreach Committee has recently awarded funding for data professionals from emerging economies to attend the IASSIST 2004 conference. Information on the completed application procedure is available at <http://www.iassist.ucdavis.edu/>. Visa inquiries should be sent to:

Cindy Severt, IASSIST 2004 Local Arrangements Chair

1180 Observatory Dr.

Room 3308 Social Science Bldg.

Madison, WI 53706 USA

[cdsevert@wisc.edu](mailto:cdsevert@wisc.edu)

608-262-0750

Last updated: March 23, 2004

## **Appendix 2: Call for Papers from Web site, 2008 and 2004 [IF JUST WANT MOST RECENT, DELETE 2004]**

### **Call for Papers**

We look forward to seeing you next May at Stanford!

#### ***Technology of Data: Collection, Communication, Access and Preservation***

The 34th International Association for Social Science Information Services and Technology (IASSIST) annual conference will be held at the Stanford University, Palo Alto, California, USA, May 27-30, 2008. This year's conference, Technology of Data: Collection, Communication, Access and Preservation, examines the role of technology and tools in various aspects of the data life cycle.

The theme of this conference addresses how technology can affect aspects of data stewardship throughout the data lifecycle. The methods and media by which data are collected, shared, analyzed and saved are ever-changing, from punch cards and legal pads to online-surveys and tag clouds. There has been an explosion of data sources and topics; vast changes in compilation and dissemination methods; increasing awareness about access and associated licensing and privacy issues; and growing concern about the safeguarding and protection of valuable data resources for future use. The 2008 conference is an opportunity to discuss the role of technology “ past, present, and future “ in all of these arenas. We seek submissions of papers, poster/demonstration sessions, and panel sessions on the following topics:

- Issues and techniques for preserving "old" data as well as information "born digital"
- Methods, technology and questions surrounding data dissemination, including best practices and innovations
- Archival and preservation challenges presented by new processes
- Metadata

- Innovation in the use of data for teaching and research
- The legal issues surrounding new technologies
- Changes in resource discovery methods
- Data services in virtual spaces
- Providing services to users with different degrees of technical "savvy"
- Tools and spaces for research collaboration

Papers on other topics related to the conference theme will also be considered. The deadline for paper, session, and poster/demonstration proposals is December 17, 2007. The Conference Program Committee will send notification of the acceptance of proposals by February 8, 2008.

Individual presentation proposals and session proposals are welcome. Proposals for complete sessions, typically a panel of three to four presentations within a 90-minute session, should provide information on the focus of the session, the organizer or moderator, and possible participants. The session organizer will be responsible for securing session participants. Organizers as well as panel participants are also welcome to submit additional paper proposals but please note that Conference Program Committee may need to limit the number of presentations per person.

Proposals for papers, sessions, and poster/demonstrations should include the proposed title and an abstract no longer than 200 words. Longer abstracts will be returned to be shortened before being considered. Please note that all presenters are required to register and pay the registration fee for the conference. Registration for individual days will be available.

Proposals can be submitted by creating a username and logging in to this web site, then clicking on the "Submit Proposal" link under the "Call for Papers." Alternatively, proposals can be submitted via email to:

[iassist08@gmail.com](mailto:iassist08@gmail.com)

A separate call for workshops was sent previously. This call is also available as a PDF document on the IASSIST web site:

[http://www.iassistdata.org/conferences/call\\_for\\_papers\\_IASSIST08.pdf](http://www.iassistdata.org/conferences/call_for_papers_IASSIST08.pdf)

# Call for Papers

## *Data Futures: Building on 30 Years of Advocacy*

The International Association for Social Science Information Services and Technology (IASSIST) annual conference will be held at the University of Wisconsin, Madison on May 25-28, 2004. This year's conference, *Data Futures: Building on 30 Years of Advocacy*, examines new issues and trends and links them to principles that have emerged during the past thirty years. Social science data producers, users, and support specialists have long understood and promoted responsibility for preservation, quality, stewardship, responsible use, and literacy. Juxtaposed against these guiding principles are pervasive and innovative national and international trends in data availability, access, and usage. New frontiers in data include the globalization of data and its commodification; integration of multimedia in research; and common concerns across nations and disciplines that confidentiality is an issue that requires constant attention.

IASSIST has been on the leading edge of data dissemination and access issues, critically examining developments in electronic delivery and privacy/confidentiality concerns. "Data advocacy" has included promoting statistical literacy among data professionals and the public; participating in the development of metadata standards for data; and working on solutions for preservation and archiving. The 2004 conference will build on this work with sessions that address various aspects of data advocacy. We seek submissions of papers, poster/demonstration sessions, and panel sessions on the following topics:

- Data services in physical and virtual spaces
- Applying metadata standards for data; exploring geospatial metadata, DDI, Dublin Core, etc.
- Archival challenges of the digital government
- Bringing numeric and spatial data into the classroom
- Collaborative data dissemination and integration projects
- Data Documentation Initiative (DDI): developments and implementations

- Data lifespan and integrity in web environments
- Promotion of data and statistical literacy
- Data quality and authentication
- Future of data warehousing and data mining
- GIS and data access
- Impact of Internet technology on social science research methods
- Infrastructure for data access and preservation
- Innovations in data delivery and access methods
- Data in institutional repositories
- Legal barriers to Internet-based data access
- Library subscriptions, licensing and data acquisition policies
- Metrics for assessing the value and impact of data in the knowledge economy
- New research/archive networks
- Preparation and dissemination of complex data for multiple user audiences
- Privacy, confidentiality, disclosure control issues
- Qualitative data issues: metadata, access, preservation, linking with quantitative data
- Relationships among archives and the social science research community
- The life cycle of research data and issues of preservation
- Universal access to public data
- User interfaces for data dissemination: best practices, innovations
- History and future of IASSIST

The deadline for paper, session, and poster/demonstration proposals is **January 16, 2004**.

The Conference Program Committee will send notification of the acceptance of proposals by **February 6, 2004**.

Session proposals should contain information on the focus of the session, the organizer or moderator, and possible session participants. It will be the responsibility of the session organizer or moderator to secure session participants.

Please send submission, including proposed title and an abstract (recommended length 150 words), to: [julie.linden@yale.edu](mailto:julie.linden@yale.edu).



5. **Would you recommend this workshop to your colleagues?**

- Yes                       No

*Additional Comments:* \_\_\_\_\_

6. **What aspects of this workshop were especially useful to you?**

\_\_\_\_\_

7. **How would you rate the facilities?**

		<b>Poor</b>				<b>Excellent</b>
<b>Location/room: 1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>		
<b>Audio/Visual Aids:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	

*Additional Comments:* \_\_\_\_\_

8. **How could this workshop be improved?**

\_\_\_\_\_

9. **Do you have any suggestions for topics for future workshops?**

\_\_\_\_\_

10. **Please provide any additional comments or suggestions you may have.**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Thank you for your time and comments.**

**Please hand in OR mail to:**

**Michael Sivyer  
Library and Information Centre  
Statistics Canada  
2-O, R. H. Coats Bldg.  
Ottawa, Ontario, Canada  
K1A 0T6**



**Comments on any aspect of the poster presentations:**

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*Please continue on back.*

5. **What did you like best about IASSIST 2008?**

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6. **What could have been done to improve IASSIST 2008?**

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7. **What topics would you like to see discussed at future IASSIST conferences?**  
*(Include workshops, plenary and concurrent sessions)*

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8. **Please provide any additional comments and suggestions that would be helpful in planning future IASSIST conferences.**

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**Thank you for providing comments about the 2008 IASSIST Conference!**

**Please turn in at the registration desk OR mail to:**

**Eleanor Read  
120A Hodges Library  
University of Tennessee  
1015 Volunteer Blvd.  
Knoxville, TN 37996-1000**

# Appendix 4: Examples of Email to Conference Chairs

## Appendix 4.1: Chair Letter #1

Subject: Chairing IASSIST Session

March

Dear NAME HERE,

On behalf of the Program Committee, thank you for agreeing to chair a concurrent session at this year's IASSIST conference in Stanford. Yours is the important job of communicating with the speakers, making sure their needs are met, and coordinating with us to make sure everything goes smoothly. This first letter is to ask you to communicate with your speakers about some details we need to confirm at this time; then, in early May, we'll write to you again with some arrangements you should discuss with the speakers closer to the event. Please let me know if you have any questions or concerns at any point along the way.

Your session is **TITLE HERE**. This is Session #HERE scheduled for **TIME HERE**. Speakers for this session are:

NAME, AFFILIATION, EMAIL HERE (not necessary if organized session)

A draft version of the program is up at URL HERE. Click on the link for your session to see the details.

Please contact your speakers within the next week regarding the following points. I will need your reply on these items either way by **Monday, April 21st**, in order to prepare the program. To assist you, following you'll find a template letter you can use to contact the speakers that you would modify to fit your particular session (note: the dates written in the template letter to speakers are a week earlier (Monday, April 14th), in order to give you time to compile and send the information to me). Note: when you have compiled all the information from the speakers' replies, please send it on to me at CHAIR COORDINATOR EMAIL HERE; please forward their information as a group, rather than sending the response from each speaker as you receive it.

Items to discuss with speakers:

1. Notify them of the time/date of session.
2. Confirm any changes to the abstracts and paper titles. A draft version of the program is up at URL here, but the above deadline is necessary for changes before it is printed. Have the speakers confirm that the information on the program (name, affiliation, title, abstract) is correct and notify us of any changes. In addition, please confirm that your name as chair is listed correctly on the program.
3. Along those lines, confirm with them their preferred speaking order. The group can go with the draft order as listed in the program or you can propose an alternative order that you think better; please ask the speakers to respond to either the order in the program or an alternative you may propose. It is important that the order of speakers ultimately listed in the program matches the order in which people will speak (conference attendees will sometimes move among concurrent sessions based on the order of speakers listed). You can also begin to think about whether or not you would like to take questions after each speaker or hold them until the end. That is up to you to decide as a group.

4. Let your speakers know how much time they will have to present their papers (15-20 minutes of speaking time per paper, to allow for setup, transition, and questions). Ask them to practice their presentation ahead of time to make sure it stays within the time limit; this is a small, but important, task to keep things on track.

5. As part of moderating the session, you will introduce each speaker. Therefore you should ask them now to send you brief biographical sketches ahead of time. There is no deadline for this, but it is wise to start early because it takes time to pull that information together.

6. Following will be the standard audio-visual setup in each room. Please forward requests for anything else.

Standard setup:

Internet-enabled laptop computer with USB port and MS Office Powerpoint 2003  
Projection screen and LCD data projector

7. Ask the speakers if they need any other special assistance and reply to us, particularly if they need accommodations regarding a disability.

Feel free to modify the letter below with any other information you think would be useful. As stated above, please send all replies to me at CHAIR COORDINATOR EMAIL HERE by **Monday, April 21st**. Please reply to me either way (even if your speakers have no changes) so that we know. And please let me know if you have any questions.

Sincerely,

NAME HERE  
Sessions Coordinator

Speaker Letter #1:

Subject: IASSIST session: information needed

Dear Colleagues,

Thank for your participation in the upcoming IASSIST Conference, Technology of Data: Collection, Communication, Access and Preservation, to be held in Stanford, May 27-30, 2008. General information about the conference can be found at: [URL here](#). I will be the chair of your session, organizing logistics ahead of time and moderating the session on that day.

Our session, **INSERT TITLE HERE**, will be held **INSERT TIME HERE**.

Following is some information I need from you at this time; please reply to me with answers to the following by **Monday, April 14th**.

1. A draft version of the program is up at [URL HERE](#) and our session is described at: [INSERT HERE THE URL FOR YOUR SESSION](#) (note: to see individual paper abstracts, you may need to click one more level down); please confirm that the information listed (name, affiliation, title, abstract) is correct and notify me of any changes by the above date.

2. Session format: You will have 15-20 minutes for your presentation. Please do a run-through of your talk beforehand to ensure that you will be within the allotted time. We have tentatively placed the speakers in the following order: [INSERT SPEAKER ORDER HERE](#). Let me know if you would recommend a different order. In addition, we can choose to take questions directly after each talk or have a period for questions and discussion at the end; let

me know if you have a preference.

3. Biographical information: As I am moderating, I'd like to be appropriately familiar with your background and your work in this area. Therefore I would ask for the following biographical information from you. Either in the form of a bio/CV or brief note, please let me know core details of your professional background that I'd want to mention in introducing you (e.g., education, relevant jobs, description of current position and institutional affiliation, anything else of note).

4. Following is that standard audio-visual setup. Please reply to me by the above date if you will need any equipment other than listed below.

Standard setup:

Internet-enabled laptop computer with USB port and MS Office Powerpoint 2003  
Projection screen and LCD data projector

Please reply to me either way on these questions, even if no changes or special arrangements are necessary. However, if you do not reply, I will assume no changes are necessary. And if there is anything else I can do to assist you in preparing for the meeting, or any other accommodations you may need, please let me know. I look forward to working with you.

Sincerely,  
YOUR NAME

## **Appendix 4.2: Chair Letter #2**

Chair Letter #2:

Subject: IASSIST: Final Details for Chairing

May 12, 2008

Dear IASSIST Chairs,

Thank you again for your participation in the upcoming IASSIST 2008 conference, Technology of Data: Collection, Communication, Access and Preservation. It promises to be a great success. This letter will provide you with more information on preparing for and running your session at the conference. Moreover, your conference registration packet will contain some specialized materials for chairs, mentioned below. As earlier, following is a form letter you can send to presenters and modify to meet your needs.

### **AV INFORMATION**

1) Again, the standard AV setup will be a:

Internet-enabled laptop computer with USB port and MS Office Powerpoint 2003  
Projection screen and LCD data projector

2) If one of your presenters must use his/her own laptop for the use of specialized software or other items, that is possible and there will be a cable in which to plug it in, but keep in mind:

a) This will take more time to set up than using the computer already there and you will need to plan for additional transition time between speakers. The speaker will need to arrive 25 minutes early to the session to make sure that it hooks up OK.

b) A special adapter will be needed for non-North American laptops to plug into the display. If the speaker does not have his/her own, please forward a request for one to the NAME at EMAIL by early next week.

c) Please notify NAME at EMAIL by early next week of those presenters that will be using their own laptop.

3) Presentations should be loaded onto the conference laptop immediately prior to your session. To ensure that everything goes smoothly, please advise your speakers to arrive at your session 20 minutes early in order to load all the presentations and get properly set up. Speakers should bring their presentations on a USB stick (note: speakers should not rely on email attachments to load their presentations). Presentations should be organized on the desktop in folders by session number.

Please note: even if a presenter is using his/her own laptop, they still should load their presentation onto this computer for the purpose of archiving on the IASSIST web site (see below).

4) Technical support will be provided by Stanford IT staff. To identify them, they will have a note on their badge.

#### AHEAD OF THE CONFERENCE:

5) Reminder: before the session, verify each participant's affiliation and obtain any biographical introductory information you feel is appropriate for doing introductions. Also, we suggest that you review the abstracts ahead of time and write yourself an introduction to the topics that you can present when introducing your session. Moreover, please prepare some probing questions about the presentations ahead of time (and during the session), so that you can use that to generate discussion if necessary.

6) If you have not done so already, decide with your presenters ahead of time if you would like to take questions between presentations or at the end.

7) Strongly suggest to your speakers that they bring multiple and back-up copies of any electronic presentation materials they plan to use (e.g. paper notes from which to work), should technical problems arise.

8) Please remind your speakers again ahead of time of the need to practice their presentation so that it stays within the designated time limit. While ideally most speakers will have 20 minutes, you should tell speakers that they have 15-20 minutes because if things come up (e.g. technical problems), speakers need to be prepared to be able to do their presentation in less time. Hopefully this will not be necessary, but we do not want speakers to feel too rushed if something happens. [Note: the one session with 5 speakers will have 12-15 minutes to speak; please modify the form letter accordingly.]

#### AT THE CONFERENCE:

9) We encourage you to meet and introduce yourself to each of your speakers earlier in the conference ahead of your session, so that you are familiar with each other and can answer any last-minute questions they may have.

10) Room assignments for sessions will be indicated in your registration packets. In addition, water will be available in the session rooms for the speakers.

11) Time limit cards will be in your registration package. Discuss these with your speakers and use them to notify them of approaching time limits (5 minutes, 1 minute, time's up). As discussed in #9 above, ideally you should be able to allow each speaker 20 minutes; however, if the session is running over for any reason, you can use the cards to trim the speaker's time to 15 minutes if needed. In addition, if you choose to take questions between speakers, please be mindful of the time and limit these to just a couple of minutes (5 at the most), so that the audience discussion does not interfere with the time available for the next speaker.

12) You also will find in your registration packet a document from the Publications Committee. For those speakers interested in publishing their paper in the IQ, you will have on-hand release forms that they can sign. Please return any completed forms to the Registration Desk.

13) As discussed above, presentations deposited at the speaker's room computer will then be given to the Publications Committee who will archive them on the IASSIST web site. Moreover, if any speakers have already written papers to submit to IQ, they can deposit them on this computer as well.

14) During the session: Make brief introductory remarks on the theme of the session, based on your review of the abstracts ahead of time. Introduce the speakers. Watch the amount of time taken by each speaker, and cue the approach of the end of his/her time with the time limit cards provided. Please stick to the time limits for each presentation so that everyone has their full time to present and time for questions (5 minutes per speaker) is provided. Come up with a few leading questions ahead of time to stimulate discussion from the floor if necessary.

#### AFTER THE CONFERENCE:

15) Shortly after the conference, please send your speakers a thank you note acknowledging their participation in the conference session and encouraging their ongoing involvement in IASSIST.

If you have any last-minute questions, please feel free to ask me before or during the conference. I will be staying at the WHERE TO CONTACT THE SESSION COORDINATOR. I will try to touch base with all of you at the beginning of the conference so that you know who I am in case you need anything. Thank you again for playing this important role and we look forward to seeing you there.

#### NAME

Sessions Coordinator  
IASSIST 2008, Stanford

-----  
Sample letter to speakers: modify as needed, including items in brackets:

#### DATE

Dear [SPEAKER NAMES HERE],

Thank you again for your participation in the upcoming IASSIST 2008 conference, Technology of Data: Collection, Communication, Access and Preservation. As the chair of your session, [INSERT HERE REMINDER OF TITLE, DATE, AND TIME OF SESSION], I am contacting you with some final details.

#### AV INFORMATION

1) Again, the standard AV setup will be a:  
Internet-enabled laptop computer with USB port and MS Office Powerpoint 2003  
Projection screen and LCD data projector

\*\*Please note: if you have created a Powerpoint slide show using MS Office 2007, that will not work on these computers. Prior to coming to the conference, you will need to save it in 2003 format.

2) If you must use your own laptop for the use of specialized software or other items, that is possible and there will be a cable in which to plug it in, but keep in mind:

a) This will take more time to set up than using the computer already there and we will need

to plan for additional transition time between speakers. You will need to arrive 25 minutes early to the session to make sure that it hooks up OK.

b) A special adapter will be needed for non-North American laptops to plug into the display. If you do not have your own, please let me know.

c) Please notify me regardless if you would like to use your own laptop so that we can advise let the conference staff.

3) Presentations should be loaded onto the conference laptop immediately prior to our session. To ensure that everything goes smoothly, please arrive at our session 20 minutes early in order to load all the presentations and get properly set up. You should bring your presentation on a USB stick (note: speakers should not rely on email attachments to load their presentations).

Please note: even if you are using your own laptop, you still should load your presentation onto this computer for the purpose of archiving on the IASSIST web site (see below).

AHEAD OF THE CONFERENCE:

4) If you have not done so already, please forward me some simple biographical information that I can use for introductions.

5) [INSERT HERE DISCUSSION OF WHETHER QUESTIONS WILL BE TAKEN IN BETWEEN SPEAKERS OR IN ADVANCE]

6) We strongly suggest that you bring multiple and back-up copies of any electronic presentation materials you plan to use (e.g. paper notes from which to work), should technical problems arise.

7) Remember to practice your presentation ahead of time so that it stays within the designated time limit of 15-20 minutes. I will have cue cards at the session to help you stay on time.

AT THE CONFERENCE:

8) I will try to meet and introduce myself to each of you earlier in the conference ahead of our session, so that you are familiar with each me and I can answer any last-minute questions you may have.

9) At the end of the session you will have the opportunity to fill out a release form for presenters who would like to submit their paper to IQ (<http://www.iassistdata.org/publications/iq/>).

10) As discussed above, presentations deposited at the speaker's room computer will then be archived on the IASSIST web site. Moreover, if any speakers have already written papers to submit to IQ, they can deposit them on this computer as well.

Please let me know if you have any questions at this time. I look forward to seeing you in Stanford.

Sincerely,  
[YOUR NAME]

### **Appendix 4.3: Chair Letter #3**

June 10, 2008

Dear IASSIST Chairs,

Thank you again for chairing a session at the recent IASSIST Conference 2008, Technology of Data: Collection, Communication, Access and Preservation. You did a wonderful job in moderating the concurrent sessions and helping them go smoothly, playing a vital role in making the conference a great success!

First, a question. As we always want to improve upon our efforts, I'd like to get your feedback on your experience as chair. Please take a minute to consider and then reply to me regarding what went well regarding chairing and the sessions and what could be improved. We'll use that information to plan the sessions for next year's conference and make any improvements necessary.

Furthermore, please send your speakers a thank you note acknowledging their participation in the conference session. As you know, efforts were made to capture all the Powerpoint presentations on the conference laptops. If any were missed, someone from the Program Committee will follow-up with individual speakers to obtain a copy if necessary.

Lastly, the editor of the IASSIST Quarterly (IQ) (<http://www.iassistdata.org/publications/iq/>) is looking forward to having volunteers as guest editors of the IQ. Typically an issue from a guest editor could consist of articles centered on a common idea or focus. This could be very parallel to a session from the IASSIST conference. As chair of a session in our recent conference you have the opportunity of bringing the articles together for an IQ issue. So we encourage you to contact the participants in your session to learn working together on an issue around the theme of your session for the IQ. If your session cannot fill a complete IQ issue, then individual articles can be sent to the IQ editor. For more information, please contact the IQ editor Karsten Boye Rasmussen, [kbr@sam.sdu.dk](mailto:kbr@sam.sdu.dk) (cc'd).

For the above two points, following is a form letter that you can use if you'd like to thank your participants and encourage IQ submissions.

Thank you again and we hope to see you again next year in Tampere!

Sincerely,  
NAME  
Sessions Coordinator, IASSIST 2008

-----  
Dear NAMES HERE,

Thank you for speaking in our session at the recent IASSIST Conference, Technology of Data: URL HERE. Our session was a great success and we appreciate your valuable contributions.

As you know, efforts were made to capture all the Powerpoint presentations on the conference laptops so that they can be made available on the conference web site. If any were missed, someone from the Program Committee will follow-up with individual speakers to obtain a copy if necessary.

Lastly, I would like to encourage you to turn your presentation into an article for IASSIST Quarterly (<http://www.iassistdata.org/publications/iq/>). I think that our session would be an appropriate theme for a special issue and would be happy to help you pull the papers together (or help you to submit articles individually). Please let me know if you are interested.

Thank you again for your participation and we hope to see you again next year in Tampere!

Sincerely,

YOUR NAME

## **Appendix 5: Examples of Notes For Speakers**

### **Appendix 5.1: Notes for Speakers: IASSIST 1990**

1. Practice your delivery before the actual presentation. Make such rehearsals as realistic as possible and time them. Refine your timing if necessary.
2. Check in with your Chair beforehand. Make sure you arrive before the session begins to take care of last minute details.
3. Something that often happens (and which invariably infuriates other speakers on the program and alienates the audience) is a speaker exceeding their time limit. **DON'T DO IT!** Make sure that you have a watch or clock and that you use it. If you suddenly find the Chair telling you that your time is up, slide gracefully into your conclusion and stop.
4. Check that you can be heard clearly throughout the room.
5. Ensure that any illustrations you use are legible and intelligible at the back of the room. Keep aids simple. Do not read every word on a transparency or slide--what you say should enhance your illustrations, not duplicate them.
6. Present your paper--don't read it. Working from notes will ensure that you give a spontaneous and effective presentation. It will also allow you to look at the audience as you speak, and will make it easier to hold their attention, gauge their reactions, and watch for questions. Never merely read verbatim the written version of your paper.
7. Beware of Jargon! Be alert to specialized terminology and be sure to explain what it means. Shun pompous language. Using notes will help you to keep your language lean, powerful and more conversational. As Winston Churchill once remarked: "Short words are best and old words when short are best of all." A good rule of thumb is to direct your talk to the least qualified listener.
8. Check all your illustrations before the session begins, to be sure that they are right way up and in the correct order. When you are using transparencies or slides, switch off the projector between illustrations to shift the audience's attention back to you. In particular, don't ever have a blank, lighted screen, it can be very distracting.
9. Begin and conclude your presentation decisively. A weak conclusion, in particular, can destroy the impact of what went on before. A strong conclusion leaves everyone feeling good about the whole project.
10. If you have a question period, be sure to repeat each question before you answer it. Try to vary the length of answers you give to questions as this will keep the session more interesting. And don't get involved in a dialogue between a questioner and yourself. Direct your answers to the audience as a whole.
11. Handouts often improve the presentation. They have an advantage over visual aids in that they are not subject to equipment availability or failure and can be retained by the audience. Handouts should include your name and address.
12. Beware of over-dependence on sophisticated hardware and/or software. If you are counting on the use of a computer as a part of your presentation, be prepared for the worse-case scenario: that it may not be working. You should be able to give a full and interesting presentation regardless.

## **Appendix 5.2: Notes for Speakers: Edinburgh, 1993**

### **MAKING YOUR PRESENTATION**

- 1.1 Practice your delivery before the actual presentation. Make such rehearsals as realistic as possible and time them. Refine your timing if necessary.
- 1.2 Check all your illustrations before the session begins, to be sure that they are right way up and in the correct order.
- 1.3 Check in with the chair of your session beforehand. Make sure you arrive before the session begins to take care of last-minute details
- 1.4 Check that you can be heard clearly throughout the room.
- 1.5 Beware of jargon. Be alert to specialized terminology and be sure to explain what it means. A good rule of thumb is to direct your talk to the least qualified listener.
- 1.6 Handouts often improve the presentation. They have an advantage over visual aids in that they can be retained by the audience.
- 1.7 Present a speech -- do not read a paper. As a meeting attendee, you have probably experienced presenters who recited their papers without lifting their heads. Generally this is a disappointing experience. Conference attendees can read proceedings to review the paper, but they cannot glean additional insights into the material unless the speaker makes a point to use this face-to-face opportunity to highlight the critical issues raised by the material. The highest rated speakers are those who have tied their presentation to the needs of the audience by relating the critical issues to current problems and giving practical applications of their material.
- 1.8 Experience suggests that 100-150 words per minute is a reasonable rate of speaking. If you plan to use visuals, allow 30 to 60 seconds for each.
- 1.9 If you are using just a few transparencies or slides, switch off the projector between illustrations to shift the audience's attention back to you. In particular, don't ever have a blank, lighted screen, it can be very distracting.
- 1.10 Make sure you have a watch or clock and use it. Something which happens often (and which invariably infuriates other speakers on the program and alienates the audience, and quite rightly so) is a speaker exceeding his time limit. DON'T DO IT! If you suddenly find the moderator telling you your time is up, slide gracefully into your conclusion and stop.
- 1.11 Conclude your presentation decisively. A weak conclusion can destroy the impact of what went on before. A strong conclusion leaves everyone feeling good about the whole presentation.
- 1.12 If you have a question period, be sure to repeat each question before you answer it. Try to vary the length of answers to questions, this will keep the session more interesting. Don't get involved in a dialogue between a questioner and yourself. Direct your answers to the audience as a whole.

### **VISUALS**

According to a study done by the University of Minnesota and the 3M corporation, speakers who use visuals in their presentations are 43% more persuasive. Below are some simple rules to follow when preparing visuals:

- Remember the "6-foot rule" - you should be able to read your overhead non-projected transparency from 6 feet away (35mm slides should be readable from 12 inches).
- Each visual should convey a single idea.
- No more than 6 words per line. No more than 6 lines per visual.
- Change visuals every 45 - 60 seconds.
- Avoid using vertical lettering.
- Use bullets not numbers when presenting lists of items.
- Use no more than two type faces in any visual.
- Use upper and lower case letters.
- If using colour - use blue background.
- Include related graphs whenever possible.
- Do not read every word on the screen. What you say should enhance your illustrations, not duplicate them.

## **INTERACTING WITH CONFERENCE ATTENDERS**

IASSIST conferences are unique opportunities for attendees and speakers alike to interact and learn from each other. The contacts made at conferences can be an invaluable source of information, business, or friendship. We urge you to take full advantage of this opportunity and make yourself available to attendees throughout the conference (and particularly immediately following your session). You may want to announce this at the end of your presentation to encourage all attendees to take the time to meet you personally. Many speakers find that these contacts are the most valuable benefit of their meeting attendance.

## **Appendix 6: Sample "Authorization to Publish" Form and Related Handouts**

[May 2006]

Session Organizers,

The Publication Committee needs your help.

Papers presented at the IASSIST meetings are the most important source for the IASSIST Quarterly (IQ). We also want to preserve and disseminate as many of the multimedia presentations as possible from the IASSIST Web site.

To get the widest range of participation from the IASSIST community, we need information on the types of presentations in each session.

We need you to keep track of the papers in your sessions so we can follow up with presenters. A form for this is provided on the next page. We also have included several release forms for presenters who would like to submit their papers to IQ. The presenters should complete these forms and give them back to you.

It is also important for you to encourage your presenters to publish with the IASSIST media outlets (IQ and the Multimedia presentation area on our Web site). Tell them about the possibilities and encourage them to participate, both before and after they have made their presentations.

Thanks,

Lisa Neidert  
Chair, Publications

Karsten Rasmussen  
Editor, IQ

## Presentation Notes

Session:

---

Organizer:

---

Presenter(s)	PPT	Notes	Paper	IQ	Form

## Coding Notes

PPT	Did the presentation include a ppt presentation? (yes/no)
Notes	Did the author speak from written notes, e.g., a partial paper? (yes/no)
Paper	Does the author have a complete draft? (yes/no)
IQ	Is the author interested in publishing their presentation in IQ? (yes/no)
Form	If yes on IQ, please have the author fill out an IQ release form

Please return this form and IQ release forms to Lisa Neidert or Karsten Rasmussen.

## Authorization to Publish in IASSIST Quarterly

Author(s):

Affiliation(s):

Title of Paper:

I herewith authorize the publication of the above paper in the IASSIST Quarterly. This paper has not been published previously nor copyrighted elsewhere.

Signature:

Date:

**Please return this form with a copy of your paper to Karsten Rasmussen:**

Name: Karsten Boye Rasmussen  
Institution: University of Southern Denmark  
Address: SDU-OU, Campusvej 55, DK-5230 Odense M,  
Denmark  
Phone: +45 6550 2115  
E-mail: [kbr@sam.sdu.dk](mailto:kbr@sam.sdu.dk)

## Appendix 7: List of Scholarly Journals and Listservs

The call for papers and conference announcements were sent to these listservs for the 2004 IASSIST Conference. The task of sending the messages was distributed among several members of the Program Committee.

[IASST-L@lists.columbia.edu](mailto:IASST-L@lists.columbia.edu)

CESSDA-L

IFDO-L

STAR-L (steinmetz archive user list)

SOC-LIB (soc-lib@nic.surfnet.nl)

ahc-l@gwdg.de (?)

capdu (Canadian Association of Public Data Users)

canicpsr (Eastern Canadian ICPSR Federation)

guido (Western Canadian Federation)

dlilist (Data Liberation List)

carta (canadian map librarian list)

govinfo (canadian govt docs list)

apdu <Association of Public Data Users>

GOVDOCS-I (US Government Documents List)

sos-data@irss.unc.edu

[PACS-L@LISTSERV.UH.EDU](mailto:PACS-L@LISTSERV.UH.EDU)

ERECs-L (Electronic Records Section, Society of American Archivists)  
archives-l

H-Net (History Network)

Request to [info@mimas.ac.uk](mailto:info@mimas.ac.uk) for MIMAS staff to post to their site reps list.

Request to a Data Archive staff person (Karen Dennison) for her to send to the archive-news list.

[sosig@jiscmail.ac.uk](mailto:sosig@jiscmail.ac.uk)

[lis-socialscience@jiscmail.ac.uk](mailto:lis-socialscience@jiscmail.ac.uk)

[datateach@jiscmail.ac.uk](mailto:datateach@jiscmail.ac.uk)

The 2008 call for papers and conference announcement were sent to the lists noted above (IASST-I through govdocs-l), plus those listed below, and were distributed by several members of the program committee. Announcements were not sent to the newsletters and journals.

gis4lib

anss-l (ACRL Anthropology and Sociology Section)

fsd-l

maps-l

asis-l

educause

d-lib

codata

Sophie Holloway sent to Australian, New Zealand, and other regions listservs

Yukio Maeda sent to Japanese and other Asian lists

Print/Electronic Newsletters and Journals:

ICPSR Bulletin, IASSIST Quarterly, Chronicle of Higher Education, D-Lib

Magazine (used to be D-Lib Forum), Social Science Computing Review (new), UK

DAbytes, Digital Preservation Coalition <[preservation@jisc.ac.uk](mailto:preservation@jisc.ac.uk)>

, RLG DigiNews.

In 2009, the following additional lists were used

- \* SPARC-OpenData@arl.org, SPARC Open Data List
- \* dcc-associates@lists.ed.ac.uk, Digital Curation Centre Associates
- \* capdu, Canadian Association of Public Data Users Membership listserv
- \* dlilist, Data Liberation List: Michelle
- \* orl, ICPSR OR list
- \* govdoc-l, Federal Depository Libraries
- \* buslib-l, business librarians
- \* digital-preservation@jiscmail.ac.uk
- \* DIGGING-FOR-DATA@JISCMail.AC.UK
- \* ESDS-News@jiscmail
- \* JISC-Repositories@jiscmail.ac.uk
  - \* lis-socialscience@jiscmail.ac.uk

## Appendix 8: Guidelines for Preparing Poster Sessions

The poster session will last two and one half hours. During this time, the presenter must remain at the display to answer questions and discuss informally the contents of the display. The setup of the display must be accomplished by the beginning of the poster session and taken down immediately after the session is over. It is strongly advised that the setup be done in the morning so any bugs can be ironed out before the session starts. Please note: there are many technological problems that can and will arise even though you think there will not be!

The poster display should include a statement of the problem, objectives of the research or project, the methodology used to solve the problem, or implement the program, the major findings or outcomes and their significance, and conclusions. A logical sequence should be evident -- introduction, development, and conclusion. Each sheet should be numbered.

Please note: poster boards are not necessarily required. But if you are using one, here are the guidelines to follow. The poster board surface area requested is four (4) feet height by eight (8) feet wide. Some boards may have an edging of up to one inch. A heading should be prepared for your presentation using lettering at least one and one-half (1-1/2) inches height. All lettering should be simple, bold and easily legible at a distance of four (4) feet. Indicate the title of the presentation, the name(s) of the presenter(s), and their institution/organizational affiliations. All materials to be posted should be prepared before you arrive. Materials will not be available at the Conference. Charts, drawings, and illustrations should be mounted on poster board or heavy stock as long as the materials can be affixed with thumbtacks or push pins on the poster board.

Use thumbtacks or push pins (WHICH YOU SHOULD BRING) to mount your poster(s) and illustrative or visual materials. A copy of your abstract in PRIMARY type or larger, if possible, should be posted in the upper left-hand corner of the board. You may wish to provide sign-up sheets to record the names and addresses of attendees who might want more information, reprints, etc. Hand-out materials are encouraged, but should be duplicated and brought with you.

Please make sure that you have a backup copy of your presentation on a CD-ROM.

[Following is a Sample Letter to Go out to Presenters Ahead of Time]

Dear [Participant],

Thank you for your upcoming participation in the 20xx IASSIST poster session in [location]. This year's Poster Session for IASSIST is shaping up to be the best ever, with a large and diverse group of presenters. There are a number of details that still remain to be worked out, however, and I look forward to your assistance in helping me with this.

First, I encourage you to look at the abstracts for the poster session and verify that the title, presenters, and abstract for your own poster are correct.

(See <http://www.location.edu/posterdescriptions>)

Please let me know if there are any additions/corrections you'd like to make.

The second request that I have is that you share your technical/support/space needs for your poster with me, so that we leave as little as possible to the last moment. The space for the poster session in [location] is [description], and I think it will accommodate the session very well. The basic setup includes:

1 Table (150 x 50 cm) (5 ft x 20")  
1 Chair  
1 Display Grill (1.2 m wide x 2 m high)  
(4 ft wide x 6.5 ft high), on which is mounted  
1 white board (1 m wide by 1.2 m high)  
(3.3 ft wide by 4 ft high)  
(The white board is fixed, and cannot be rotated to a "landscape"  
position.)

A second table (to make your table area deeper, not longer) and  
additional chairs are provided upon request.

Electric outlets/power strips and wireless access also can be made  
available on request, but these aren't included in the venue's "basic  
plan", so \*please\* be frugal on behalf of IASSIST and request only  
what you need.

=====  
PLEASE MODIFY THE LIST OF EQUIPMENT BELOW TO MATCH YOUR NEEDS and  
RETURN IT TO ME.  
=====

XXX Tables (No Table, 1 Table, 2 tables)  
XXX Chairs  
XXX Display Grill & Whiteboard (No grill/board, 1 grill/board)  
  
XXX Electrical Outlet NEEDED (Yes, No)  
XXX Wireless connectivity needed for poster (Yes, No)  
Other Needs (please specify)

I/we will sit BEHIND / IN FRONT OF the table.

=====  
As this session shapes up, I will recontact you with additional  
details on the location of your poster.

Any other wishes? Let us know and we will see what we can do.

Thanks,

[poster coordinator]

## Appendix 9: Examples of Call for Sponsorship Letters

IASSIST/IFDO'93  
19th Annual International Conference  
Edinburgh, May 11-14 1993

The International Association for Social Science Information Service and Technology (IASSIST) will hold its 19th annual conference in conjunction with the International Federation of Data Organizations (IFDO) in Edinburgh over the period 11 - 14 May 1993. This is the first time that the conference has been held in the UK.

IASSIST is the professional association that brings together individuals from around the world who are engaged in the acquisition, processing, distribution and service provision of computer-readable text and numeric social science data. Founded in 1974, membership includes data archivists and librarians, information specialists, social science researchers, computing professionals, planners and government agency administrators. IFDO is the organization of national and regional data archives and data libraries established in the mid-1970's to foster the growth of social science data library facilities. IFDO member institutions, currently in some 20 countries, work to minimize the technical and legal barriers to data exchange between researchers in different countries in order to allow the free flow of data within the international research community.

### Opportunities for sponsorship

Welcome Reception at HM General Register House, Princes Street

Reception buffet and drinks     £1000

Drinks only     £400

Icebreaker - tour of Edinburgh followed by buffet meal with wine in North Queensferry

Tour £500

Wine £500

Conference Dinner - Assembly Rooms, George Street followed by ceilidh

Wine £500

Entertainment £600

### Sundries

Document holder etc £800

Refreshments (coffee etc.) £700 per day

Further information can be obtained from

Alison Bayley

Data Library, The University of Edinburgh

Main Library Building, George Square

Edinburgh EH8 9LJ

Scotland, UK

tel     +44 (0)31 650 3303,     FAX     +44 (0)31 662 4809

e-mail   iassist93@edinburgh.ac.uk

## **IASSIST 1995**

Dear M. Bonnelly:

Every four years an institution in Canada is invited to serve as the host site for the annual conference of the International Association for Social Science Information Services and Technology (IASSIST). In 1991, the Data Library at the University of Alberta hosted the meetings in Edmonton; four years earlier the Data Library at the University of British Columbia hosted the conference. The IASSIST Administrative Committee is very interested in Quebec City as the location for the 1995 conference and would be very grateful to receive your support from the Library at the Universite Laval.

Founded in 1974, IASSIST is an organization of individuals that encourages and supports the establishment of information centres for data reference, maintenance and dissemination at local and national levels. This includes data libraries, data archives and related data services, whether the institutional setting is a traditional archive, university, government agency or commercial organization. Furthermore, IASSIST fosters international dissemination and exchange of information on significant developments in information centres for statistical and textual databases. The organization also promotes the development of professional standards and encourages the education and training of information centre personnel.

The annual conference financially supports itself and traditionally meets in a conference facility. Host institutions are usually asked to coordinate local arrangements with the conference hotel, provide volunteer staffing during the meetings (e.g., two or three staff to operate the registration desk), provide technical resource people to assist with computing needs for demonstrations and workshops (e.g., one or two technicians to assist with setting up computing equipment and someone to provide trouble-shooting during the demonstration sessions), participate in the official welcoming of attendees on the opening day, and occasionally to provide facilities for workshops (e.g., reserving a computing laboratory on campus for a session about Unix or Navigating the Internet.) As you can see, our request of the host institution is primarily for human resources and in some instances special facilities. There will not be a request for any monetary support and an independent bank account will be created to administer conference expenses.

Your colleague, Gaetan Drolet, is a valued member of IASSIST and has provided our Administrative Committee with helpful information about Quebec City as a conference site. I wish to ask for your formal support of M. Drolet's involvement as the local arrangements officer for the 1995 conference.

I am hopeful that you will find the prospects of hosting IASSIST a pleasant and rewarding venture. One important payoff that I foresee in hosting IASSIST 1995 is that this conference could prove to be a valuable catalyst in helping promote the creation of new data service facilities in Quebec. If I can provide you with any further details, please do not hesitate to contact me. I look forward to your response.

### **IASSIST 2006 - Mailed Letter Text - Sent in Early December**

Dear <CONTACT NAME>

I am writing to inform you about a unique opportunity taking place at The University of Michigan in May, 2006. The University of Michigan Libraries, the School of Information, and the Inter-university Consortium for Political and Social Research (ICPSR) are hosting the annual meeting of the International Association for Social Science Information Service and Technology (IASSIST).

This conference brings together over 200 professionals from around the world working with information technology and data services to support research and teaching in the social sciences.

Its members work in a variety of settings often serving as directors of libraries, national data archives, statistical agencies, research centers, academic departments, government departments and non-profit organizations. Many of the conference attendees control buying or influence purchasing decisions related to subscriptions, software and other data service delivery-related products.

On behalf of IASSIST, I would like to invite and encourage <ORG NAME>'s participation in the conference. You were identified as an organization that attendees would like to see as part of this annual meeting. The conference runs from May 23 through May 26, 2006, in Ann Arbor, Michigan.

Enclosed are a variety of sponsorship opportunities. For more information on the conference and IASSIST, please visit: <http://www.icpsr.umich.edu/iassist/index.html>.

*The deadline to reserve a sponsorship is February 1, 2006.* Please contact me with any questions, and we hope that you will strongly consider participating in IASSIST 2006!

Best regards,

### **IASSIST 2006 - Email Text - Sent in early January**

Dear <CONTACT NAME>

In early December, I contacted you to inform you about a unique opportunity taking place at The University of Michigan in May, 2006. The University of Michigan Libraries, the School of Information, and the Inter-university Consortium for Political and Social Research (ICPSR) are hosting the annual meeting of the International Association for Social Science Information Service and Technology (IASSIST).

This conference brings together over 200 professionals from around the world working with information technology and data services to support research and teaching in the social sciences.

Its members work in a variety of settings often serving as directors of libraries, national data archives, statistical agencies, research centers, academic departments, government departments and non-profit organizations. Many of the conference attendees control buying or influence purchasing decisions related to subscriptions, software and other data service delivery-related products.

Once again, on behalf of IASSIST, I would like to invite and encourage <ORG NAME>'s participation in the conference. You were identified as an organization that attendees would like to see as part of this annual meeting. The conference runs from May 23 through May 26, 2006, in Ann Arbor, Michigan.

Attached are a variety of sponsorship opportunities. For more information on the conference and IASSIST, please visit: <http://www.icpsr.umich.edu/iassist/index.html>.

*The deadline to reserve a sponsorship is February 1, 2006.* Please contact me with any questions, and we hope that you will strongly consider participating in IASSIST 2006!

Happy New Year!

## IASSIST 2006 – Sponsor Packages

### Gold Sponsor Package

- Name and logo on conference Web site and on conference signage
- Direct link on conference Web site to your Web site for one year
- Name and logo on canvas bag provided to each attendee
- Name and logo in conference program as Gold sponsor
- Inclusion of promotional literature and/or items in attendee bags
- One free conference registration; reduced registration fees for additional members
- Cost: \$1,100

### USB Memory Stick Sponsor Package

- Includes Gold Sponsor Package
- Black/White logo on one side of USB memory stick promotional item provided to each attendee
- Only one sponsorship available!
- Cost: \$1,700

### Email Station Sponsor

- Name and logo in program as Email Station sponsor
- Direct link on conference Web site to your Web site for one year
- Name & logo on sign identifying location of email station
- Small table (unattended) near email station for distribution of literature/promotional items
- Cost: \$700

### Lunch Sponsor (3 available)

- Name and logo in program as sponsor
- Direct link on conference Web site to your Web site for one year
- Name and logo on sign identifying location of luncheon
- Small table (unattended) near event area for distribution of literature/promotional items
- Cost: \$600

### Break Sponsor (5 available)

- Name and logo in program as sponsor
- Direct link on conference Web site to your Web site for one year
- Name and logo on sign identifying location of break
- Small table (unattended) near break area for distribution of literature/promotional items
- Cost: \$450

### Poster Session Sponsor

- Name and logo in program as sponsor
- Direct link on conference Web site to your Web site for one year
- Name and logo on sign identifying location of poster session
- Small table (unattended) near poster session for distribution of literature/promotional items
- Cost: \$500

**IASSIST 2006 SPONSORSHIP OPPORTUNITIES**  
**May 23 - 26, 2006**  
**Ann Arbor, Michigan**

**Sponsorship Reservation Form**

Reservation Deadline: February 1, 2006

Date:

Sponsorship Requested:  
Sponsorship Cost: \$

Organization Name:

Contact Name:

Title:

Address:

Telephone:

Email address:

Gold Package Attendee, if any:

Gold Package Only - Additional Attendees @\$180 each:

Non-sponsor Registration - <http://www.icpsr.umich.edu/iassist/registration.html>

Total Sponsor Fee: \$

Payment Method:

- Check enclosed (*made payable to ICPSR*)
- Credit Card\*

\*For payment by credit card, please contact us by telephone (see below)

Conference sponsorship will be confirmed upon receipt of payment.

**IASSIST Sponsor Contact Information:**

Linda Detterman

Marketing & Membership Director

ICPSR

University of Michigan

PO Box 1248

Ann Arbor, MI 48106

Phone: (734) 615-5494/Fax: (734) 647-8200

[lindamd@umich.edu](mailto:lindamd@umich.edu)

## Appendix 10: Friends of IASSIST 2003

The Friends of IASSIST 2003 program aims to bring select information partners and data organisations together with data service professionals at an international conference to be held in Ottawa during May 25-30. This will be achieved by seeking conference sponsorships in return for promotional opportunities and participation in professional activities.

One of the main objectives of IASSIST is to organise an annual conference involving participants from North America and Europe. The 2003 IASSIST conference, which will be held in Ottawa during May 25-30, will be a joint meeting of IASSIST and CAPDU (the Canadian Association of Public Data Users). One day during the conference week will also be dedicated to training for representatives of the 66 Canadian Universities that are members of the Data Liberation Initiative (DLI). All in all, the 2003 IASSIST/CAPDU/DLI meetings promise to be one of the largest gatherings of data professionals ever held in Canada.

A venue such as this is an excellent one for interactions between data professionals and companies and organisations involved in software, data services, GIS and information technology. The 2003 conference organising committee is providing an opportunity for companies and organisations to be visible and involved in the IASSIST/CAPDU/DLI meetings through a program of sponsorship and participation. While these meetings are not normally highly commercial in nature, there will be some scope during the 2003 meetings for companies and organisations to make themselves known and available to participants through a variety of sponsorships and events that are outlined below.

Sponsors are being asked to contribute \$1000 to help defray the costs of the conference in return for the following benefits:

- Name and logo on the conference web site and at the conference;
- Name and logo on the padded notebook and canvas conference bag which will be provided to each conference participant;
- Name and logo on the tables at lunch hour;
- Inclusion of promotional literature in the registration kits; and
- One free conference registration to a member of the company/organisation. The conference registration includes a welcoming reception one evening and a dinner boat cruise on the Ottawa River another evening. These events provide an informal opportunity to meet and interact with conference participants.

Please note, in order to receive these benefits offers must be made by April 9, 2003.

For more information please contact Ernie Boyko  
(Mail: [eboyko@statcan.ca](mailto:eboyko@statcan.ca), Phone: 613-951-8218)

# Appendix 11: Workshop Presenters Reimbursement Policy

Revised June 3, 2002

## **POLICY FOR WORKSHOP PRESENTER COMPENSATION:**

Purpose: To compensate IASSIST workshop developers for the level of effort required to prepare and present high-quality workshops for the annual IASSIST conference. This offer is made with the understanding that many of our presenters are not fully supported by their institutions and are preparing and presenting workshops on their own time.

### **Compensation Plan:**

Workshop presenters who make a substantial contribution to the development and presentation of the workshop will be allowed to register for the related conference at no cost subject to the financial considerations listed below. A minimum of one registration per workshop will be offered. This registration benefit may exclude special events such as the banquet at the discretion of the Local Arrangements Chair.

Workshops presented and prepared by more than one individual may be allowed additional registrations at the discretion of the local arrangement committee in consultation with the Treasurer. The free registration(s) may be divided equitably among the workshop preparers/presenters.

Workshop presenters will be offered the option of paying regular registration fees and having those funds contributed to the IASSIST Outreach Fund.

[Note: In 2006, we reimbursed one workshop presenter per workshop. Also, a policy was in effect that any workshop with less than 5 registrants would be cancelled.]

### **Financial Considerations:**

The assumption of all IASSIST Conferences is that they should cover their costs. All efforts should be made to assure that there is both adequate interest in the workshop topics and limited competition within specific time slots to assure that workshops cover their costs including the cost of presenter compensation. This determination should be made early in the conference planning stage in order to ensure a full slate of quality workshops.

In the event that the IASSIST Conference does not cover its costs, the Local Arrangements Chair in consultation with the Treasurer, may be required to limit the offer for presenter compensation. For example, compensation may be limited to general registration fees and not include special events such as the banquet. This determination should be made as early as possible and will take into account the cost to the conference of canceling a workshop should the presenter be unable to attend without presenter compensation.

### **Process:**

At the discretion of the Local Arrangements Chair, workshop presenters may either pre-pay their registration (to be offered reimbursement post-conference) OR be allowed to register without payment and be billed post-conference for any outstanding amount. Coordination with those handling registration and a special registration form for workshop presenters is strongly recommended in order to reduce possible confusion.

OPTION 1 - Prepayment and post-conference reimbursement:

1. Workshop presenters are contacted with information about the compensation policy (see sample A2, below) when they are enlisted to give a workshop.
2. Registration is handled in the standard manner, presenters register and pay conference fees.
3. Workshop organizer provides Local Arrangements Chair with a list of workshop presenters.
4. Local Arrangements Chair, in consultation with the Treasurer, will determine if any restrictions are to be imposed based on financial considerations. This determination will be based upon the financial considerations outlined above. The distribution of limited funding within a workshop group will be determined by the Local Arrangements Chair in consultation with the workshops organizer.
5. Local Arrangements Chair will contact all workshop presenters who also attended the conference and offer to reimburse their conference fee (or a designated portion thereof) and include a standard reply form (see sample B below). Reimbursement options include:
  - Check to funding institution (for funded attendees)
  - Check to individual (for unfunded attendees)
  - Option to contribute the registration amount to the IASSIST Outreach Fund

OPTION 2 - No prepayment and possible subsequent billing:

1. Local Arrangements Chair, in consultation with the Treasurer, will determine if any restrictions are to be imposed based on financial considerations as outlined above. If this decision can not be made well before the conference, presenters will be notified of the compensation policy and intent (see sample A1, below). The distribution of funding within a workshop group will be determined by the Local Arrangements Chair in consultation with the conference workshop organizer.
2. Workshop presenters are contacted with information about the compensation policy when they are enlisted to give a workshop. (Sample notification below)
3. Workshop organizer provides Local Arrangements Chair with a list of workshop presenters
4. Local Arrangements Chair contacts presenters and informs them of the process for registering without payment (for example: a special registration form, a payment code, etc.) The presenter/s will be given the option of refusing this compensation and contributing the amount to the IASSIST Outreach Fund. List of presenters is provided to the person/organization handling registration processing. Presenters provide all registration information to those handling the registration process.
5. Local Arrangements Chair will contact all workshop presenters who also attended the conference, informing them of the amount covered by IASSIST and a bill for the outstanding amount (if any).

## **Appendix 11.1: Sample Notification to Workshop Presenters: Notification of Intent but no Guarantee**

Workshop Presenter Compensation:

In gratitude for your upcoming workshop participation at the IASSIST Conference, the Administrative Committee of IASSIST, under the guidance of the IASSIST Treasurer and the Conference Local Arrangements Chair, will offer workshop presenters reimbursement for conference registration. However, in the event that the IASSIST Conference does not cover its costs, the Local Arrangements Chair in consultation with the Treasurer, may limit the offer for workshop presenter compensation. For example, compensation may be limited to general registration fees and not include special events such as the banquet. Note that you may refuse this compensation and contribute the amount to the IASSIST Outreach Fund.

Note that if more than one individual is involved in the preparation and delivery of the workshop, your group will be offered the equivalent of ONE registration fee (if compensation is to be offered) which can be allocated among the presenters as determined by the workshop group in consultation with the conference Local Arrangements Chair. {note: if more than one fee may be reimbursed, state so here}

After the conference, you will be notified about the amount of reimbursement of your registration fees. Reimbursement options include:

- Check to funding institution (for funded attendees)
- Check to individual (for unfunded attendees)
- Option to contribute the registration amount to the IASSIST Outreach Fund

{add registration process details here}

## **Appendix 11.2: Sample Notification to Workshop Presenters: Minimum Compensation Guaranteed**

Workshop Presenter Compensation:

In gratitude for your upcoming workshop participation at the IASSIST Conference, the Administrative Committee of IASSIST, under the guidance of the IASSIST Treasurer and the Conference Local Arrangements Chair, will offer workshop presenters reimbursement for their full conference registration fees. Note that you may refuse this compensation and contribute the amount to the IASSIST Outreach Fund.

If more than one individual is involved in the preparation and delivery of the workshop, your group will be offered the equivalent of ONE registration fee, which can be allocated among the presenters as determined by the workshop group in consultation with the conference Local Arrangements Chair. {note: if more than one fee will be reimbursed, state so here}

{add registration process details here}

## **Appendix 11.3: Sample Post-Conference Reimbursement Form**

Workshop Presenter Compensation:

In consideration of your contribution to the success of the IASSIST 20xx workshops, XXX% of your conference registration costs have been waived. Please complete the information requested below and return this form to:

[return options and information]

Registration Fee	
Amount Pre-paid	
Amount Waived	
<b>Amount to REFUND</b>	
<b>Payment amount DUE</b>	

- I do not require waiver of my registration fees. Please contribute this amount to the IASSIST Outreach Fund.
- Please process a credit transaction for the credit card account used for original payment
- Please send a refund check/cheque to the individual or organization listed below:

Make check/cheque payable to: \_\_\_\_\_

Mail to: \_\_\_\_\_

Individual or Organization \_\_\_\_\_

Name: \_\_\_\_\_

Attention: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

City, State/Prov. and Postal \_\_\_\_\_

Code \_\_\_\_\_

Country \_\_\_\_\_

## Appendix 12: Examples of Chair Recruitment Letters

### Appendix 12.1: Chair Recruitment Letter: Targeted

Dear \_\_\_\_\_,

We the Concurrent Session Co-coordinators for the upcoming IASSIST conference would like to invite you to be a chair for one of the sessions, SESSION NAME. We believe you would be a valuable choice for the session because THEIR PARTICULAR REASON.

If you haven't done it before, chairing involves a few main responsibilities:

- Communicating with the speakers regarding their needs (e.g., AV)
- Coordinating a few logistics within the session (e.g. speaker order)
- Moderating the session at the conference

For general information about the program, see:

<http://dpls.dacc.wisc.edu/iassist2004/program.html>; details about this particular session are listed at SESSION URL.

Please let either of us know if you're interested by DEADLINE.

Sincerely,  
Kate McNeill-Harman  
Ellie Read

### Appendix 12.2: Chair Recruitment Letter: Conference Committee

Hello everyone,

We the Concurrent Session Co-coordinators are in the process of finalizing chairs for the sessions. There are a few sessions for which we are still looking for chairs and are asking for volunteers from the Committee. Several of you are chairing already--thanks!

For those of you who haven't done it before, chairing involves a few main responsibilities:

- Communicating with the speakers regarding their needs (e.g., AV)
- Coordinating a few logistics within the session (e.g. speaker order)
- Moderating the session at the conference

Following are the sessions that still need chairs; for some of them we have invited someone but haven't yet heard back and are looking for a backup (I've labeled those "pending"); details about the sessions are available off the program at <http://dpls.dacc.wisc.edu/iassist2004/program.html>:

[LIST OF SESSIONS]

Please let either of us know if you're interested, either in a particular session or simply in general, by this Friday, April 30th.

Sincerely,  
Kate McNeill-Harman  
Ellie Read

# Appendix 13: Concurrent Session Chair Responsibilities and Suggested Timeline

## Appendix 13.1: Chair responsibilities:

I. Contact authors--Letter #1 (Coordinators do a template for them):

- time/ date of session
- confirm abstract & paper title by: \_\_\_ date; requests for shorter ones
- describe AV setup; ask additional needs
- ask biographical information for introductions
- ask preferred speaking order
- reminder of length of time (15-20 mins. per paper) and need to practice
- ask any special accommodations needed

II. Reply with:

- changes in abstract & paper title: to Coordinators
- AV & special accommodations: to Coordinators (who'll forward to LAC)
- changes in order of program: to Coordinators

III. Contact authors--Letter #2 (Coordinators do a template for them):

- describe final logistics & room arrangement
- say where you're staying/how to get in touch w/you for any last-minute needs
- explain how you'd like to handle introductions and questions
- remind to have multiple copies of presentation (if technical difficulties), handouts if applicable
- coordinate working with presentations off of personal/conference computers; try to get all presentations on same machine
- consider obtaining and reviewing presentations ahead of time for moderating
- information on putting presentations on web and IQ from Publications Committee

IV. At Conference

- ensure room arrangement, AV, etc. is done
- ensure presentations are on available machines
- remind speakers of time & how handling introductions and questions
- time cards with 5, 1, and 0 minutes remaining
- report any problems to Coordinators
- moderate: introductions, field questions, commentary/summary when possible

V. After Conference

- send speakers a thank-you note for participating
  - remind speakers to submit papers to IQ and put electronic presentations on web

## Appendix 13.2: Concurrent Session Chair Timeline

Three months prior (i.e. March)

- Finalize schedule and session titles
- Publicize schedule on web site
- Finalize chair responsibilities
- Compose chair email
- Send email to potential chairs:
  - targeted

- program committee as necessary
- Assign chairs to sessions as they are recruited
- If necessary, send email to more potential chairs via admin list and iassist-l

Two months prior (i.e. April)

- Contact chairs and outline their duties in detail; including Letter 1 for speakers (outlining expectations, confirming info., AV or other needs)
- Session chairs send email of Letter 1 to speakers
- As receive from chairs, start compiling information from speakers (AV, etc.)
- Remind chairs and collect remaining necessary speaker info.
- Report necessary speaker information to local arrangements /program committee

Month Prior (i.e. May)

- Communicate with local arrangements committee to ensure necessary setup for speakers
- Send chairs Letter 2 for speakers (further expectations, details for sessions, info. from publications committee)
- Session chairs send email of Letter 2 to speakers
- Remind chairs to send Letter 2 to speakers

Week of Conference

- Be available on-site for questions from chairs or speakers; arrange communication vehicle
- Check on-site arrangements for:
  - speaker needs
  - publication info.

Month after (June)

- Remind chairs to remind speakers to submit PPTs and papers for IQ publication

## Appendix 14: Sample Chair Report Form

### IASSIST 2006 Chair Report Form

A. Your Session Title:

---

B. Chair (your name): \_\_\_\_\_

C. Number of Presenters during your session: \_\_\_\_\_

D. Approximate Number of Attendees \_\_\_\_\_

E. Highlights of the session

F. Other comments

**Please return this form to the Registration Desk so it may be passed on to the person giving the Conference Wrap-up on the last day.**

**Thank you for your efforts to document the material covered in your session!**

## Appendix 15: Description and Application for Outreach Funding from Web site, 2004



The mission of the IASSIST International Outreach Action Group is to provide support for data professionals from emerging economies who are developing information infrastructures regarding the use and preservation of public and private data and implementing information policy decisions at their home institutions. During the past 8 years, IASSIST International Outreach has provided financial assistance to 37 Conference Participants from around the world.

Again this year, IASSIST will provide limited funds to support attendance at the IASSIST 2004 Annual Conference, DATA FUTURES: BUILDING ON THIRTY YEARS OF DATA ADVOCACY, to be held at the University of Wisconsin - Madison campus on May 25-28, 2004.

Applicants may request funding to cover expenses in up to two of the following three areas: 1) conference registration fees, 2) airfare, or 3) hotel. Please be aware that Outreach funding is not intended to cover the ENTIRE cost of attending the conference. The applicant's home institution MUST provide some level of financial support to supplement the IASSIST Outreach award. Strong preference will be given to first time Outreach participants and only fully completed applications will be accepted.

Application deadline: Monday February 16, 2004. Successful applicants will be notified no later than Friday, February 20, 2004.

Problems? Need help? Contact:  
Ilona Einowski at [ilona@ucdata.berkeley.edu](mailto:ilona@ucdata.berkeley.edu)

(form contained a link to the application page)

## **Appendix 16: Visa Support Policy – Outreach Participants and Others Requiring Visas to Attend the Conference**

IASSIST policy states that the organization will provide letters of support for visa applications only to participants who have committed to giving presentations as part of the formal IASSIST program and who have registered to attend the conference.

To receive a letter of support, the registrant must make a request to the Administrative Committee and supply the following information:

- Dates of travel
- Professional affiliation
- The name of one contact person as a reference with contact information
- Type of letter requested; sample text appreciated
- Address or fax number for consulate or embassy to which letter should be sent

The registrant should note that approving the request and generating the letter of support may take up to a week and thus all requests should be made as far in advance of the conference as possible.

In 2008, official letters of support to attend the conference were handled by the International Outreach Committee chair.

# Appendix 17: Example Web Submission Form, 2009

## Call for Papers: Submission Form

Please use this form to make your submissions for IASSIST 2009 (note: proposals for workshops should be made directly to NAME at EMAIL). For more information, see the Call for Papers. Please note that all presenters are required to register and pay the registration fee for the conference. Registration for individual days will be available.

\*=required information

### Type \*

- Individual paper presentation, typically ~15-20 minutes in length, which the organizers will assign to a session with like papers, organized around a theme
- Session, an entire 90-minute session with all participants planned (can take many formats; see the Call for Papers)
- Poster/demonstration, to be presented at the poster session; can be a printed poster discussing a project and/or live demonstration with a computer

Have you presented at IASSIST before?

- No
- Yes

### Submitter Information

- Lastname:\*      Firstname:\*      MI:
- Affiliation:\*
- Position:
- Address:
- Country: Email:\*

Topic: Title of your paper, session, or poster/demonstration\*

### Abstract \*

Please limit your abstract to 200 words. Longer abstracts will be returned to be shortened before being considered.

### Keywords \*

Please select all that apply. These keywords will help the Conference Program Committee organize received proposals into sessions.

[check boxes for selection of multiple keywords from a list, as well as a free text field for "other"]

### Presenter(s) Information

1. If the proposal is for an individual paper, please provide the name, affiliation, and email of the presenter (if different from submitter above):
2. If the proposal is for an entire session, please provide the name, affiliation, and email of the moderator (if different from submitter above):
3. If the proposal is for an entire session, please provide the names, affiliations, and emails of the participants:

If your paper is not accepted as proposed above, would you be willing to consider doing your presentation in a different format (i.e. individual paper, session, or poster)?

- No
- Yes

Special accommodations needed or other pertinent information

Further information about the conference can be found at:

<http://www.fsd.uta.fi/iassist2009/>

Questions may be sent to the Program Committee at [iassist2009@gmail.com](mailto:iassist2009@gmail.com).

The Conference Program Committee will send notification of the acceptance of proposals by Friday, January 16, 2009.

# Appendix 18: Report on the 2009 Conference Proposal Management System

A Report on IASSIST Conference Proposal Management System (CPMS) and Its Applications on IASSIST 2009 Conference Website

By

Kobby Sekyere (sekyerk@muohio.edu), Tuomas J. Alaterä (tuomas.alatera@uta.fi) and  
Lu Chou (cchou2@wisc.edu)

June 29, 2009

IASSIST 2009 was the first conference that used CPMS to streamline conference proposals and create reports for the Program Committee. Conference proposals were submitted to a web form at the IASSIST conference site. These proposals were directly entered into a MySQL database. After a proposal was submitted, an email message containing the information entered in the form was automatically sent to the submitter.

In the past, Program Committee (PC) members spent significant time parsing proposal information from email messages and entered the proposals into spreadsheet files. CPMS allowed 2009 PC members to focus on evaluation and organization of the proposals without spending their valuable time copying and pasting proposals. CPMS can produce reports in html files which can be easily modified and published at the conference website. In the following paragraphs the details about CPMS and its applications on the conference website are explained.

Conference Proposal Management System (CPMS) was developed by Kobby Sekyere, an Information Service Librarian at Miami University in Oxford, Ohio. Kobby designed a web form with fields based on the PC members' suggestions. He wrote a PHP script to collect the data from the form and stored them in respective fields in a MySQL database hosted in Miami University. Before the call for papers went out, Kobby's web form was implemented by Tuomas J. Alaterä, an Information Network Specialist at Finnish Social Science Data Archive in the University of Tampere on the 2009 conference website. Tuomas and Kobby did extensive testing on the form and how it should communicate with the fields in the database before they published the form on the conference website.

The web form Kobby designed for IASSIST 2009 includes keywords which were the topics in the call for papers announcement. These keywords were useful for evaluating and organizing the proposals. After the deadline for proposal submission passed, Kobby created separate reports for individual papers, sessions, and posters in Microsoft Word and Excel format from his database. These reports were uploaded to the PC Google group space for the PC members to review. These proposals were then evaluated and organized into sessions for the conference program. After PC finalized the program, Kobby wrote another PHP script to produce plain html files. These html files included most of the elements (CSS classes and id's) that Tuomas had designed for the web version of the conference program. So Tuomas could easily apply his style sheet and publish it at the conference website.

After hosting the conference, Tuomas has rewritten the form. Below are two examples of the web form which could be modified and used for the future IASSIST conference.

Redesigned 2009:

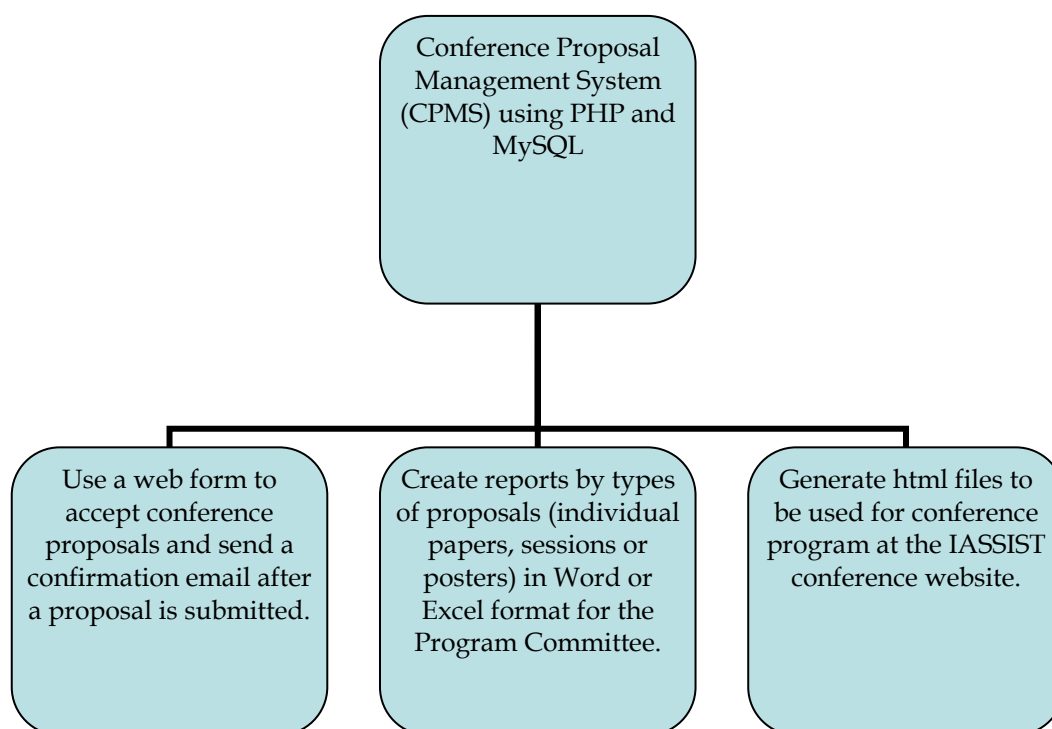
- [http://www.fsd.uta.fi/hk/tuomas/logos/form\\_generic.html](http://www.fsd.uta.fi/hk/tuomas/logos/form_generic.html)

Generic alternative:

- [http://www.fsd.uta.fi/hk/tuomas/logos/form\\_generic\\_alt.html](http://www.fsd.uta.fi/hk/tuomas/logos/form_generic_alt.html)

The key issues related to Local Arrangement Team/Conference website management are:

- Form xhtml is (almost) completely independent of any layout definitions. It uses fieldset structure and is controlled by style sheet(s) and can thus be modified by modifying the CSS. The above alternative design example demonstrates this (nothing else is different but the CSS).
- In addition, a couple of small java script snippets are added to control the length of an abstract. This feature is useful for both submitter and the program committee to keep the abstract short.
- Also the conference program needs to have a clear structure if it is to be generated and published easily using CPMS. IASSIST 2009 program relied heavily on style sheets (CSS) so it was fairly easy to generate the initial program for the Web because most of the elements were already placed in the plain html field produced by Kobby's PHP script.
- After the program was published on the conference website, any additional changes requested by Program Committee or presenters were done directly on the conference website by Tuomas. The corresponding records in Kobby's database were not changed.
- 2009 program used java scripting to hide and display abstracts. This solution made it possible to keep the titles, presenters and abstracts all together and to avoid jumping back and forth to anchor points within the program or hiding abstracts behind many clicks.



As the above chart demonstrates, CPMS has many useful features. It can help Program Committee and Local Arrangements Committee to get their tasks done more efficiently. We had a very positive experience using CPMS for IASSIST 2009. However, we have a few points we like to share.

- PC members need to follow the structure of the table in the database and be aware of the fields used in the web form are linked to a table in the database.

- When the deadline for proposal submission passes, the web form needs to be disabled. We left the form on a bit longer and received a couple late proposals which PC had to handle.

It is naturally possible to generate an IASSIST conference program style that CPMS produces. This would restrict the way the program is displayed on the conference website in the future. Given that the program includes meetings, social events, breaks etc. Local Arrangements team might like to implement the form and the html files locally to keep a coherent look of the conference website and promote its conference location. However, if IASSIST wants to create a permanent site for its annual conference, the web team can look into CMS or a wiki application.

We hope that CPMS will continue to be used in future IASSIST conferences. We will be happy to assist the PC and LAC in using CPMS in their conference planning.