



Conference Planning:

AN INSTRUCTIONAL GUIDE FOR SCIENTISTS



PLANNING A CONFERENCE

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Planning A Conference



Planning A Conference

Meetings help scientists share information, solve problems, and build collaborations. For a meeting to succeed, the organizers must, throughout the planning process, carefully consider the intended objectives and outcomes of the meeting and the overall experience of the meeting attendees. This toolkit guides scientists who are new to planning scientific conferences through the process in a series of easy steps that define the focus, format, and size of your meeting.

DECISIONS AND ORGANIZATION

Deciding if You Need a Meeting

Before spending substantial time and effort planning a meeting, consider these questions:



1. What is the purpose of your meeting?

Working with a few team members or alone, decide what you hope to accomplish with a meeting. Do you want to share current research, solve a problem, or network with other scientists or industry professionals? Or is your aim to make a decision, solve a problem, or inform a group of people about something new?



2. Could you accomplish the same goals with a better platform?

If you feel that there's a need to hold an in person meeting, evaluate whether you could reach your intended outcome remotely. Can this topic be discussed effectively by email, telephone, or web conferencing? Or do you need to assemble a group of people to make a decision? Does a particular group need to be made aware of a topic? Can this topic best be addressed in a one-on-one setting?

If there's a good reason to hold a meeting and a physical meeting is the best option, you will need to recruit a small group of like-minded people for your organizing committee, establish a timeline, and then estimate the meeting size, find a location, and make a budget. If this sounds a lot like writing a grant application, don't be surprised – it is. And you can leverage all your grant-writing skills to make your meeting a success.

Assembling an Organizing Committee

The first step to planning a successful meeting is assembling a committee of devoted, organized people with assigned areas of responsibility. The structure of your organizing committee will vary based on the size of the meeting you are planning and on available resources, but consider roughly 5–10 people. The committee should reflect the topical areas you want to include in the meeting – for example, an epigenetics meeting would include scientists with expertise in chromatin modifications, small RNAs, etc.

The tasks for an organizing committee include:

1. Define the scope of the meeting
2. Establish a timeframe and key tasks for the meeting
3. Plan symposia and workshops
4. Identify and recruit speakers, sponsors, and attendees
5. Help select the abstracts that should be given slots for talks
6. Create a budget
7. Review past meetings of similar size or scope and implement improvements

SAMPLE ORGANIZING COMMITTEE



Chair



Co-Chair



Committee
Member



Committee
Member



Committee
Member

Once you've identified the members of your committee and assigned each member a role, plan and share with them what format your internal committee meetings will take, how frequently they will be scheduled, and what methods of communication you plan to use.

Establishing a Theme

One way to set expectations for your meeting and to make the event cohesive and memorable is to create a theme for your meeting. The theme should align with the purpose and goal of your meeting and should represent the overarching subject of your meeting. The theme will influence your messaging to attendees and from the speakers to the attendees. It should be shared with the speakers and weaved into meeting presentations and meeting promotions.

Creating a Realistic Timeline

Securing a good venue and getting commitments from speakers requires that you plan many months, if not years, beforehand, particularly for high-demand locations. For example, the ASPB Meeting & Event Solutions team begins planning the annual Plant Biology meeting program at least two years in advance, and more when the meeting is held in Hawaii; cities and venues are identified as many as five or six years prior to the conference. Smaller meetings have more flexibility, but the location should be established at least a year in advance.

SAMPLE TIMELINE:



STEPS:

1. Identify an organizing committee and set the scope of the meeting.
2. Select a date for the meeting.
3. Select a site for the meeting, and make arrangements to reserve facilities.
4. Make arrangements for housing, travel, and food.
5. Plan the agenda, book speakers, and identify and secure sponsors.

This timeline was presented at a workshop on organizing a meeting at the Plant Biology 2016 meeting in Austin, TX

SETTING PARAMETERS: WHO, WHEN, AND WHERE

Selecting a Meeting Date

Selecting the date(s) for your meeting is a crucial, often undervalued step, as selecting a bad date can negatively impact meeting attendance and hamper your marketing efforts. Knowing the date of the meeting also provides key information for selecting the venue.

In selecting the best time of year for your meeting, consider competing plant science meetings, religious holidays, and cultural events. Think about your attendees and what holidays they might celebrate; for example, attendees from China celebrate Lunar New Year in late January or early February. It couldn't hurt to contact some of your potential keynote speakers and check on their availability, too.

MEETING DATE CONSIDERATIONS



Religious
Holidays



Conflicting
Event



Good
Weather



Convenient
Day(s) of
Week

If there is a larger, conflicting meeting that many of your target attendees will want to attend, consider holding a satellite meeting at the same location..

Estimating Meeting Size

The size of the meeting is the next key parameter to consider, because this will influence your venue choice and provide key information for budgeting. Both the purpose of your meeting and the interactions needed to accomplish this purpose will affect the size of the meeting you should hold. Although this parameter is important, estimating meeting size is an inexact science. Consider the number of journal articles published in the field, the size of previous meetings, and the size of similar meetings. The invitation list will probably change during planning, but draw up a tentative list of researchers, post-doctoral fellows, students, and industry professionals who would likely contribute to and benefit from the meeting. Advice from colleagues and experienced meeting planners such as ASPB Meeting & Event Solutions can help you estimate how many people will likely attend your meeting.

Selecting a Venue

When selecting a venue for your meeting, consider all of your meeting parameters, including date, location, number of attendees, cost, technology required, services, and accommodations. Think about how accessible the venue is at the selected time of year for local and out-of-town attendees. If your meeting is local, then try to host it close to your institution. If the majority of attendees will be traveling from out of town, the venue should be relatively close to an airport and hotels. Being close to attractions also helps with marketing and provides an extra incentive for attendees to come to your meeting.

Venues in remote locations may make transportation a little more challenging, but will give the meeting a cozy, collegial feeling, with Gordon Conferences being the classic example. College campuses are generally a little more affordable than major conference centers, but they may not offer as many accommodations or amenities. Conference centers and hotels work best for large meetings, but they tend to be pricier.

VENUE CHECKLIST

- Desirable Location
- Available For Desired Meeting Date
- Price is Within Budget
- Size Meets Requirements
- Has Sufficient Technology
- Accessible for Attendees
- Nearby Attractions
- _____
- _____

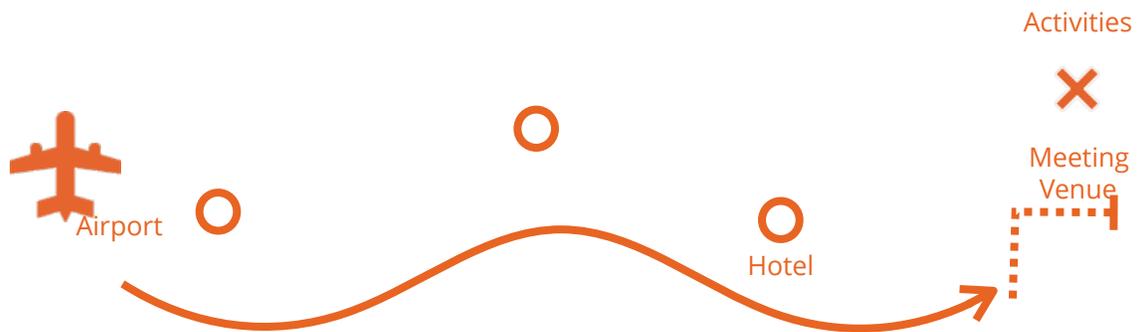
AMENITIES

When selecting a venue, consider accommodations, such as food and beverage services, WiFi, workout centers, and concierge services. Accommodations shape the overall meeting attendee experience and may influence people’s decisions on whether or not to attend.

TRANSPORTATION

Attendees will need to know how to get to the meeting, book and find their accommodations, get meals, and access attractions in the venue city. Speak with officials at the venue about their recommendations on getting attendees to and from the meeting and include information like the number of attendees needing transportation, their points of origin and destinations, and other needs for transportation during the meeting, like off-site group activities.

GETTING TO AND FROM MEETING



In a walkable city with good public transportation, many attendees may be left to their own devices. For less-accessible locations, the organizers may need to provide transportation, for example buses from the airport or to an off-site event organized as part of the conference. When exploring transportation options, inquire about the following and make sure any contracts include details such as:

- Can there be multiple stops and/or routes?
- How long is the ride/route from the point of origin to the destination?
- Is there a minimum or maximum service time?
- What's the cost per person?
- Do you have partner hotels or meeting venues?

SITE VISITS

Has your lab ever had a site visit from your granting agency? Well, now it's your turn! Before you sign off on a venue, make sure to pay it a visit in person – even if you have been to the city and the venue before. You will have to look at the site through the critical eyes of a meeting organizer, keeping in mind how the attendees will experience the site. Bring along a few of the members of the organizing committee – preferably the ones who can be difficult to please. Also, try to go at the same time of year as the meeting – you can't guarantee the same conditions, but you might get an idea, for example, that you should reconsider holding that February meeting in Chicago.

MONEY MATTERS

Creating a Budget

The budget helps the organizing committee manage and control meeting expenses. Most importantly, it helps reduce unnecessary spending. The budget for your meeting should be realistic, include critical elements that align with the meeting's objectives, and be reviewed and updated regularly.



The three basic steps to creating a budget for your meeting are:

1. Establish the overall meeting budget
2. Decide how to manage the budget
3. Determine the budget line items

To establish a budget for your meeting, you'll need to determine the amount you are authorized to spend and estimate the actual cost of the meeting. Often, an organization will give the meeting planner a set amount to spend on the meeting. If this is the case, then you can begin creating a budget after you've identified how you plan to manage the budget. If not, contact other scientists who have planned meetings and ask them if you can look at their budget to get an idea of cost estimates. Another way to determine a budget is to request quotes from vendors. Lastly, don't be afraid to contact the ASPB Meeting & Event Solutions team. They are always available to help.

After the budget has been determined and approved, identify a budget management tool. This can be an internal program used within the organization or a simple Microsoft Excel spreadsheet. If your organization does not have a specific budget tool or program, you can use the template budget that the ASPB Meeting & Event Solutions team has created in Microsoft Excel (see p. 33). . Begin building your budget by identifying different spending categories, such as: food, rentals, venue, A/V, video/photography, transportation, marketing, speakers, and activities. Remember to update the budget every time a meeting expense is created or modified. Review the budget regularly and communicate budget inconsistencies or changes as soon as they occur.

Identifying Funding Sources

Now that you have a budget for what you will spend, you need to find funding to cover these expenses. The most common sources of funding are participant fees, sponsorships, and government grants.

PARTICIPANT FEES

Charging attendees to attend and participate in a meeting is the most common form of funding. Typically, the attendee fee covers all of the basic meeting needs, like the cost of the venue, equipment, meeting materials, and meals, and speaker costs. Setting a price to attend a meeting affects the budget and the success of the meeting. The price might attract and motivate people to register or it might deter them. You will also want to make sure your price allows for the organization or event to generate sufficient revenue to cover the cost of the meeting.

To determine the registration fees for your meeting, start with the organization's meeting history or the costs for previous meetings in the field. See what was charged in the past and review the sales trends. Was there a specific price that yielded more or fewer registrants? Was there an early bird rate or tiered pricing based on career stage? Revisit the meeting budget and get a good sense of how many attendees you'd need at each of those price points to cover the cost of the meeting.

Because attendees will attend the meeting for different reasons, tiered pricing is a good option. For attendees who want to get the most for their money, mid to high pricing is appropriate. Some attendees will be motivated to pay lower cost registration fees associated with an early bird rate because they feel they are getting a better deal.

SPONSORSHIPS

To secure sponsors, you must strategically identify potential sponsors and then convince them that they will benefit from sponsoring the meeting. A large part of that benefit derives from the people attending the event, who are potential customers and/or partners. Information that would be of interest to potential sponsors for a meeting includes:

- A general summary of the meeting, including the purpose, notable participants, and an overview of what attendees can expect during the meeting.
- A profile of people who will attend the meeting and have attended past meetings.
- A summary of how you will market the meeting (social media, email marketing, advertising).

Identifying Target Sponsors

To increase your chances of securing a sponsor, reach out to past sponsors and to sponsors who support your field of research or industry. Look for companies that advertise in key journals and that have sponsored similar meetings. Personal connections can also help; for example, your keynote speakers may have industry collaborators. Make a list of likely sponsors to contact and have the contact initiated by the person with the closest connection.

Creating a Prospectus

The prospectus provides a “sell sheet” that describes the location and purpose of the meeting, provides information on the likely attendees, and details exactly what the sponsors get for how much money. To identify sponsorship opportunities and set prices, look at prospectuses from other meetings. You can also refer to the sample prospectus in the Resources section, below.

GOVERNMENT GRANTS

Government grants to cover the cost of meetings are challenging to secure and often require the involvement of an organization to demonstrate a specific community or research need. As a successful scientist, you have probably written many grants, so don't hesitate to pursue this approach. Check with professional societies, and consult the following non-exhaustive list of agencies, bodies, charities and foundations that fund plant and crop science research across the globe for current funding opportunities:

<http://globalplantcouncil.org/resources>

A point to remember is that in obtaining a government or other grant you need to be aware of submission deadlines. You should also check with program officers or directors on what can be covered when applying for a grant for a meeting – you might be surprised.

Assessing Viability

Planning a meeting involves a substantial commitment of money and, even more important for the busy scientist, time. Before going all-in, check that your budget makes sense, with estimated income balancing estimated expenditures. Consult the organization sponsoring the meeting, if there is one, and also your organizing committee. Confer with experienced colleagues to make sure these estimates are realistic.

Marketing & Logistics



Marketing And Logistics

MEETING DETAILS

Communicating with Attendees

Having clear, easily accessible information helps people who have decided to attend your conference and can be used to encourage potential attendees to register. Therefore, communication and marketing are linked endeavors. The meeting website is key to these endeavors, and a conference app and other forms of social media play supporting roles in increasing interest. As your meeting planning evolves, you will need to think about how to get people to notice and register for the meeting. As soon as you've finalized the date, venue, and theme of your meeting, start marketing it. In addition to producing a buzz surrounding the meeting, many scientists will need substantial advance notice, particularly international attendees.

WEBSITE

The conference website should highlight exciting features of the meeting and the attractions of the location, while simultaneously giving attendees easy access to the information that they need. An event website is the first place people go to look for meeting information. The website should therefore be the central location for anything related to your meeting and should include important information that will help attendees decide if this is a meeting they would like to attend, what they can expect to learn, who they will learn from, and who will be in attendance (including sponsors).

To make the website attractive, include speaker photos and bios and high-quality images and videos from other meetings that are relevant to your meeting. Most importantly, do not forget to include a link to the meeting registration page. Most meeting organizers subcontract website design and programming; ask the organizers of other meetings or consult the Resources list at the end of this document for suggestions.

ADVERTISING

If your budget allows you might consider purchasing ads in journals or other publications your potential attendees might read. You can also prepare flyers for distribution at other meetings in advance of your own.

MEETING APP

The days of massive printed abstract books are long gone. A competent web developer can produce an app for your meeting that shows schedules, abstracts, attendees, and other useful information. As for the website, you will probably want to subcontract this (see Resources).

EMAIL MARKETING

Although emerging social media feeds have taken the place of much direct marketing, email marketing can generate interest and direct traffic to the meeting website. Multiple emails can be sent over time, starting with an announcement email, followed by a reminder email, and ending with a “last chance” email. As you get closer to the meeting, update your emails announcing speakers and sponsors. To acquire email addresses, check with your professional societies and organizers of related meetings. Services such as Constant Contact and MailChimp make it easy to create and send marketing emails. Just proceed with caution so that you don’t veer into the realm of spam.

SPEAKERS

Speakers provide valuable information to attendees during the meeting and can also help add value before and after a meeting. Once you’ve secured a speaker, ask them to share the meeting information on their website and social media and professional networks. After the meeting, ask them to provide a testimonial or a write-up with their key takeaways that can be shared via social media or in a follow up email to attendees. Both can be used to help promote future meetings.

SOCIAL MEDIA

Social media networks allow people to engage and share information before and during the meeting. To track this activity and to better promote your meeting, establish an event hashtag that is specific, easy to remember, and not already being used. Include the date; for instance, #plantbio16 and not #plantbiology. Keep the hashtag short for those on phone keyboards, so avoid #ASPBannualplantbiomeeting2016, for example. Promote the hashtag on your meeting website, marketing materials, and across your social media networks.

As with email marketing, make sure that your social media posts include useful information and strike a good balance between visibility and annoying repetition. For conferences, posts could include information on speakers, attractions in the host city, interesting restaurants, and tips on transportation. Make sure to include a link to registration and encourage your organizing committee and speakers to share or re-tweet. You can also generate a Twitter list of attendees, and groups on Plantae, Facebook or LinkedIn to encourage attendees to start discussions before the meeting begins. Curate the discussion

after the meeting to keep people interested and engaged. Post photos, presentations, and any other related content to the meeting.

The current universe of social media is dominated by Facebook, LinkedIn, and Twitter. Make sure to use those, plus any additional emerging platforms that your audience uses. It can help to have a dedicated committee member manage this effort and work with your organization's social media team, if there is one.

TOOLS FOR MARKETING YOUR MEETING



Website



Email
Marketing



Social
Media

SPONSORS

Sponsors commit to meetings because they want visibility and access to your attendees. Leverage their presence by including their logo on meeting materials and the website. You should also ask them to cross-promote your meeting by sharing the meeting website (and hashtag) on their website and with their social media networks.

Registration

Online registration offers value to meeting planners and meeting attendees. It's a way to collect attendee information (that can be used for future marketing efforts and meetings), receive payment, and track who and how many people to expect for the meeting. Online registration also saves time and money by reducing administrative tasks at the meeting. Meeting attendees benefit from pre-registration by having a guaranteed attendance to the meeting and can opt in to receive specials and information related to the meeting.

REGISTRATION SYSTEMS

There are many registration tools to select from. So many, in fact that choosing one can be overwhelming. To understand which types of software might be useful in accepting online registrations you need to really answer three questions.

1. Do you simply need a quick, inexpensive, and easy way to collect credit card payments?
2. Will you need to take other kinds of payments as well such as sponsorships or exhibitor funds?
3. Do you need to integrate registrants into a database or do you want a way to keep the information from year to year?

Once you have answered these questions you can simply do some comparison shopping through google, your colleagues, or other sources. At the end of the day, what is most important in identifying a system are these factors:

1. Is it easy to set up and will the user have an easy time registering?
2. Does the system capture the information you want?
3. Are there hidden fees in addition to all the bank fees?
4. Does the system allow you to integrate well with an email marketing function, social media function, and scheduling function?

If you keep these ideas in mind when making a selection you will definitely find a system that you can not only recommend but use over and over again.

CREDIT CARD AND OTHER FEES

Once you know what your software vendor will charge for setting up the system and you fully understand if there are transaction fees from the vendor along with a per person cost, then you will need to take a deep dive into the world of credit card processing or merchant services fees.

There are often as many as four vendors taking fees from every credit card transaction, and although you don't have to have an intimate knowledge of the inner-workings of the bankcard system, it is good to have a general understanding of how credit card processing works because fees are incurred at different stages along the way.

One approach is to have a financial partner that is Payment Card Industry (PCI) compliant to handling the banking aspects of your conference registration. But whatever route you take, you will need to consider how to account for these fees in your budget. Here are some links that you might find helpful:

<https://www.merchantmaverick.com/the-complete-guide-to-credit-card-processing-rates-and-fees/>
<http://www.transfirst.com/resources/glossary>
<https://premierpaymentsystems.com/need-know-credit-card-processing/>

CANCELLATION POLICIES

Cancellations happen, but managing these can be a logistical nightmare for organizers. Make sure that your policies, including dates past which no refunds will be issued, are posted prominently on the website and appear during online registration process.

Resources for Attendees

ACCOMMODATIONS

When you chose the venue, you considered that attendees would need rooms, either in a hotel or college dorm. Based on your best estimate of the number of attendees, you need to reserve blocks of rooms that are convenient to the conference site. Hotels near major conference centers will give conference rates and hold rooms; ask the conference venue for their partner hotels. Reservations for these rooms can be handled through the registration system (often for small meetings held on college campuses), or by having attendees contact hotels directly. Give information, including prices and contact numbers, on your conference website.

TRANSPORTATION

Attendees can use their own modes of transportation to get to and from the meeting using the information you provide on the website. However, if you are arranging any specific transportation, you can have attendees sign up for these services during registration. Such transportation could include tours of local attractions (the botanical garden, perhaps) or buses from the airport for locations that are not well-served by public transportation.

RESOURCES FOR INTERNATIONAL ATTENDEES

If your meeting is in the U.S., attendees from other countries might need a visa to attend the meeting. They will need to apply for a visa 4–6 months in advance. They might also be required to have a letter of invitation to get their visa; be prepared to provide such a letter on request. Indeed, if you can have a checkbox in the registration system for “request letter of invitation”, this will help your international visitors navigate the registration process.

FOOD AND ENTERTAINMENT

Provision of food for meetings can range from all-inclusive (generally for meetings on college campuses, particularly in isolated areas) to letting attendees fend for themselves (generally in city conference venues with a vibrant local restaurant scene). Providing meals gives attendees more opportunities to network and also allows students and post-docs to mingle with the “big kids”, but does restrict meal choices. Catering a few select meals can keep breaks short and make meetings flow more smoothly; for example, a catered lunch can keep attendees from wandering far afield for sustenance. Pro tip: avoid boxed lunches if you can-- a buffet spread avoids extra charges for packaging. In addition to three square meals, attendees will likely want snacks (and more importantly, caffeinated beverages) for breaks between sessions. Also, if you schedule mixers and poster sessions, snacks and beverages give the attendees a reason to linger and interact.

Many meetings include a closing party or other event. Your host venue can help you identify party sites and give you references for local entertainment. Parties can enhance the attendee experience and encourage networking. Think about your audience here – would they appreciate a rollicking party with loud music, or might a tea party at a botanical garden be a better fit? Your only limits are your imagination – and your budget.

CREATING AN AGENDA

Agendas keep meetings (and the people who attend them) focused. To create an agenda that best uses attendees’ time, develop a sequence for the meeting. Start with the first thing attendees should do when they arrive for the meeting and end with the very last activity. Designate a specific amount of time for each activity and account for meals and breaks. See the sample meeting agenda in the Resources section (below).

Finding the Right Speakers for a Meeting

Speakers can contribute hugely to the success of a meeting, attracting people simply because of their name, title, and reputation within the discipline. Equally, bad speakers can damage the reputation of the meeting if they are unengaging, off-topic, or long-winded. Seek out speakers who are well respected, diverse, fit the meeting theme, and who have experience presenting to various group sizes. Here are a few tips on how to find speakers:

Ask your Meeting Attendees

Leverage your social media community or email list and ask attendees of previous meetings whom they’d like to hear from and what topics they’d like to hear about.

Research Speakers for Related Meetings

Check out upcoming and past meetings that cover your field and view their list of speakers. See if you can find any feedback on individual speakers and do additional research to see if they've presented on similar topics at other meetings.

Pay Attention when Reading Books, Journals, and Articles

Is there an author or columnist who publishes on or covers your meeting topic regularly? Reach out to them and see if they are available for speaking opportunities.

Call for Proposals

A call for proposals, also known as a request for proposals, is a way to attract speakers to your meeting. This process can be as simple as posting your presentation needs and meeting date to a website requesting speakers to submit information about their speaking experience and ideas for a presentation to you.

Once you receive their information, do your due diligence by researching their background, social media engagement, and testimonials from past speaking engagements.

Speaker Outreach

If there are speakers known within the community that would be of interest to your attendees, reach out to them directly via a phone call or email. Be sure to include the meeting date, location, size, and purpose, and a list of topics of interest. It would also be helpful to include the ideal length of the presentation and the meeting type. Be prepared to address their questions regarding the nature and extent of any support the meeting can provide to encourage their participation.

If you are looking to secure more than one speaker for your meeting, use the checklist in the Resources section to make sure the speakers are diverse in terms of gender, ethnicity, and area of expertise.

Abstract Request and Process

To fill the available talk and poster presentation slots within your conference schedule, it is common to solicit presentations from outside of your organization through an abstract call or call for abstracts. The abstract call provides those interested in presenting their research at your conference an opportunity to submit a brief summary (abstract) of their presentation with hopes of securing a presentation slot (either talk or poster). The

Organizing Committee is typically responsible for reviewing each abstract submission and making the selections.

To start the process, the Organizing Committee must determine the criteria or submission guidelines for the abstract call. Here are a few items to consider when constructing your submission criteria:

- **Eligibility:** Who would you like to submit their work? i.e. graduate students, postdoctoral scholars, senior faculty and/or industry researches
 - How many abstracts is one author allowed to submit?
- **Requirements:** What must the submitter do or have prior submitting their abstract? i.e. register for the conference or must agree to policies and/or disclosures
- **Abstract Word Count:** Abstract word counts can range from as low as 200-300 words to as high as 2,000-2,500 words.
- **Program Tracks:** In building your conference's program, tracks or themes should have been established. Listing those tracks and having the submitters select the category into which their presentation best falls will ensure even coverage in content being delivered at the conference.
- **Abstract Call & Notification Timeframe:** How long will the call remain open for submissions? When can submitters expect to be provided accept/reject notifications?

To collect the abstract submissions you might want to identify an abstract system/platform that can manage the process online. The marketplace offers a wide variety of systems/platforms - from sophisticated tools that handle abstract management, presentation reviews, and speaker management to more basic tools that specialize in only abstract management. It would be in the organizer's best interest to select the system that works best for the organization's needs.

Talks and Poster Sessions

In addition to recruiting speakers for talks, most conferences select speakers for shorter talks from among the attendees who submit abstracts. This selection process, which can involve hundreds of abstracts, is one of the main chores of the Organizing Committee. Make room in your agenda for these brief talks, often held in concurrent sessions, because they add depth and breadth to the program, while also providing great opportunities for early career scientists to showcase their work..

Creating Networking and Engagement Opportunities During a Conference

People attend meetings and events not only to gain insight, but also to connect and network with other people. Dedicate time on the agenda for networking activities, like an evening social or in-between sessions. Encourage attendees to participate. Also cultivate a robust community on social media, as described in the Marketing section, above.

Meeting Checklist

A large part of a meeting's success depends on the level of preparation leading up to the meeting. Planning should begin many months before the meeting, but there will be tasks that need to be performed closer to the meeting and at the meeting. Here is a list of tasks to be completed at the meeting.

MEETING DAY CHECKLIST

- Arrive early
- Check to make sure the meeting space is set up correctly
- Identify bathroom locations
- Layout materials
- Set up check-in
- Make sure audio-visual works
- Be in place 30 minutes before meeting begins
- Greet Attendees

Meeting Closeout



Meeting Closeout

Congratulations! You've successfully planned and hosted your first meeting. Now what? You'll want close out the meeting. Closing out a meeting ensures that all meeting and payment obligations are satisfied and provides one final opportunity to communicate to meeting attendees and to the organizing committee.

POST-MEETING COMMUNICATION

Communicate with attendees immediately after the meeting. Within one week of the meeting, send a follow-up email to each attendee with a summary of the meeting, information on upcoming meetings, and materials and presentations from the meeting. Use this same email to seek feedback on topics and areas of interest for future meetings. See the example of a post-meeting follow-up email in the Resource section, below. Send your post-meeting email to attendees as soon as the meeting has ended, while the meeting is still fresh in their minds.



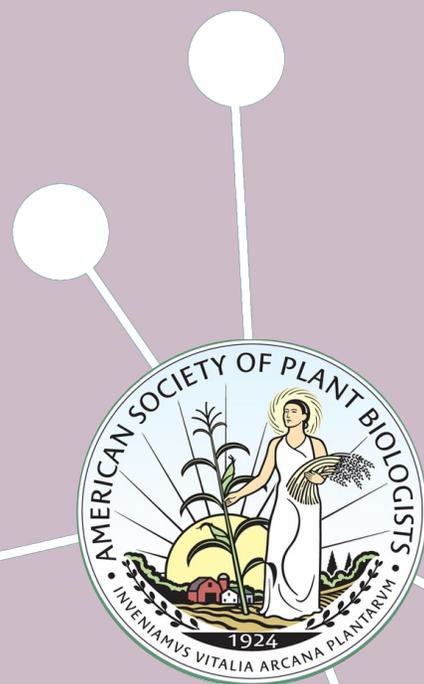
INVOICING AND PAYMENT OBLIGATIONS

Reconciling invoices and making final payments is also part of the meeting closeout process. While vendors have their own process and requirements for when and how to make the final payment, the meeting planner is responsible for making sure this happens. Defer to the vendor contracts and be sure to note the final payment due date, which can vary from 30 days before the meeting to seven days after the meeting. Remember to provide your organization's billing and finance point of contact with all final invoices as soon as they are received from the vendor. Be sure to obtain a copy of the paid receipt after the final payment has been made.

Meeting planning is challenging and involves a lot of different pieces. Thankfully, you don't have to plan it by yourself. Leverage the power of an organizing committee, plan ahead (at least 12 months out), and focus on the meeting attendees' experience.

Happy planning!

How ASPB Meeting & Event Services Can Help You



How ASPB Meeting & Event Services Can Help You

The team at ASPB Meeting & Event Services has organized dozens of meetings, both small and large, over many years. They put together the annual Plant Biology meeting, along with multiple specialty and satellite meetings, such as the annual Phenome conference, Bioenergy meetings in 2008 and 2014, and several of the other plant science meetings. These meetings range from thousands of attendees to fewer than one hundred. Services we offer include:

REGISTRATION AND ABSTRACT MANAGEMENT

Registration poses one of the most-complicated logistical issues for meeting organizers. Build the registration form you want and implement it easily. Our easy-to-use system also allows you to download your abstracts into a program book or mobile app, and review abstracts online.

PAYMENT AND FINANCIAL SUPPORT

Connect your registration form automatically to ASPB's payment processing center. ASPB Meeting & Event Services also includes financial support, such as separate, PCI-compliant bank accounts, management of credit card payments and disputes, payment of vendors and speakers (in the correct currency), financial reconciliation, and issuing of refunds.

VENDOR & VENUE MANAGEMENT

ASPB Meeting & Event Services has organized meetings. ASPB has buying power to help you pick the best venue for your event and negotiate contracts with terms favorable to you. You'll get personalized support from our professional planner who will travel with you to take care of logistics so you can focus on the science. We can also manage international conferences, including applying for VAT exemptions.

EVENT MARKETING

ASPB's database has contact information for over 30,000 plant scientists that can be filtered by demographics to target the promotion of your event. Our experienced writers and editors can produce targeted marketing content, edit abstracts, presentations, and conference proceedings, and work with your staff on key projects.

For more details, and to get started with our experienced meeting planners, check out our website at <http://meetings.aspb.org/>.



Resources

Resources

SAMPLE AGENDA

Here is an example of an agenda for a one-day *Information Sharing* meeting.

8:00 am – 9:00 am	Registration and Networking Breakfast
9:05 am – 10:05 am	Opening & Morning Keynote: Understanding the Plant's Lifecycle Speaker, Dr. Polly Ploidy, University of Pennsylvania
10:05 am – 10:15 am	Coffee Break
10:20 am – 11:20 am	Lecture: The Future of Tropical Plants Dr. Bryo Phyta, Association of Plant Biologists
11:25 am – 12:30 pm	Lunch
12:35 pm – 1:35 pm	Afternoon Keynote: Plant Defense Speaker, Dr. E. Licitor, John Hopkins University
1:40 pm – 1: 50 pm	Coffee Break
1:55 pm – 2:55 pm	Panel and Q&A Session with Plant Biologists
3:00 pm – 3:10 pm	Break
3:15 pm – 4:15 pm	Breakout Session A - Plant Life and Today's Ecosystem or Breakout Session B - Microorganism & the Impact to Plant Reproduction
4:20 pm – 4:45 pm	Meeting Wrap Up and Closing
5:00 pm – 7:00 pm	Evening Social and Networking Session

POST-MEETING FOLLOW-UP EMAIL

Subject Line: Thank you for attending the Plant Science Meeting

Dear Flora,

Thank you for attending our meeting last week! We hope you found it valuable and can use this information to further your studies in plant science. The presentations and materials provided during the meeting are now available via the following links:

Basics of Plant Science 101
Plant Science Resource Sheet
Plant Science Meeting Recap

So that our future meetings continue to cover topics of interest to the community, we encourage you to take this brief survey.

For more information on Plant Science and to learn more about upcoming meetings, visit the ASPB website at www.aspb.org.

Thank you again for attending the Plant Science Meeting. We hope to see you at the next meeting!

Kind regards,

Theo Broma

SPEAKER CHECKLIST

- Event Name: _____
- Event Date: _____ Event Time: _____
- SPEAKER INFORMATION
- Name (as it should appear in all publications)
- Title (as it should appear in all publications)
- Institution and website (as it should appear in all publications)
- Mailing address (for payment processing if needed)
- E-Mail address
- Assistant (if applicable) _____
- Name – email and phone number
- Photo for website and program book – jpg or gif for website and if the book is a print one you need a high resolution file
- Bio for website/introduction
- Title of presentation
- Brief description for website and marketing material
- A/V needs if special requirements
- Any disability needs or if you are having a meal any particular dietary requirements
- Flight and hotel information
- Speaker reimbursement fees and what currency does the speaker need to be reimbursed in
- Do you need to issue any tax related forms based on the payment
- Thank you emails

SAMPLE BUDGET EXCEL SPREADSHEET

INCOME	AMOUNT
Registration Fees	
Advertising/Sponsorship	
Table top displays	
Cancellation Fees	
Ticket sales for meals or special events	
Guest tickets or registrations	
Grant Funding	
EXPENSES	COST
Meeting Management and Support Personnel	
Registration Software or Vendor	
Credit Card charges/Bank Charges	
Abstract submission software and processing fees	
Promotion e-marketing and marketing expenses	
Audio Visual Expenses	
Meeting room rental fees	
WiFi expense	
Printing (program book-misc materials- any brochures or flyers required)	
Poster Boards and Exhibit set-up costs	
Security (if required by the venue)	
Speaker Fees	
Speaker Travel	
Signage at the venue	
Liability Insurance (if required by the venue)	
Coffee Breaks/Snacks/	
Meals such as luncheons or dinners	
Special reception(s) expenses	
Entertainment costs	
Conference Bags & Promo Items	
Travel reimbursements for grant awardees	
Organizing committee travel and expenses	
Administrative staff travel (if using)	
Registration Personnel (temporary)	
Postage and Freight	
Registration and Office Supplies	

For More Resources Visit:

WWW.MEETINGS.ASPB.ORG

