**“Project Management Framework for the 2026 Pan American Conference in Transportation and Logistics Research’**

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**Executive Summary**

The 2026 Pan-American Congress in Transportation and Logistics Research (PANAM 2026) is a binational, dual-site conference to be co-hosted by San Diego State University (SDSU) in California, USA and the Universidad Autónoma de Baja California (UABC) in Ensenada, Mexico. This project report presents a comprehensive management framework for planning and executing PANAM 2026, emphasizing methodological rigor and coordinated hybrid operations across the two sites. The conference’s mission is to foster hemispheric collaboration in transportation and logistics research, bridging disciplines, languages, and borders. The dual-venue approach is innovative for the PANAM series, reflecting a commitment to inclusivity and cross-border partnership. This report details the problem context, project objectives, methodology, results, challenges, and recommendations for ensuring a successful PANAM 2026.

Organizing a major academic conference across two international sites introduces complex challenges in logistics, communication, and stakeholder coordination. Key issues include synchronizing activities between SDSU and UABC, managing cross-border travel and visa requirements, leveraging digital platforms for hybrid participation, and maintaining a unified conference experience. The PANAM 2026 conference expects 200–250 participants, including researchers, practitioners, and students from across the Americas. Ensuring high stakeholder satisfaction (e.g. attendees, sponsors, hosts) and meeting research dissemination goals are top priorities. Past dual-site or hybrid events – such as CHIWORK 2022 (a hybrid academic symposium), the 2006 Melbourne Commonwealth Games (a multi-venue mega-event), and the 2024 African-European Astronomy workshop – highlight both the potential benefits and pitfalls of distributed event management. Lessons from these cases inform the organizing committee's framework design. For example, hybrid conferences can greatly increase accessibility and inclusivity, though achieving meaningful interaction between in-person and remote participants is non-trivial. The dual-site format for PANAM 2026 aims to maximize inclusion of Latin American researchers (via the UABC venue) while retaining international engagement and prestige at the U.S. venue (CHIWORK, 2022).

The project management approach follows the Project Management Institute’s PMBOK framework, adapted for a binational, hybrid event context. The organizing committee conducted a thorough literature review of prior multisite conferences and cross-border projects and interviewed key stakeholders (organizing committee members at SDSU and UABC, potential attendees, sponsors such as Caltrans) to gather requirements and concerns. Using those insights, the organizing committee designed an integrated management plan covering scope, schedule, cost, quality, human resources, communications, risk, procurement, and stakeholder management for the conference. Notably, the organizing committee incorporated binational extensions to standard PMBOK processes – for instance, parallel planning teams in each country with defined integration points, bilingual communication plans, and cross-border risk mitigation strategies (such as contingency plans for visa delays or travel restrictions). The organizing committee selected appropriate digital tools to support the process: EasyChair was chosen as the conference paper submission and review system due to its robustness and familiarity in the academic community, and other tools (project management software, virtual meeting platforms, etc.) were evaluated for coordinating the organizing committees and enabling hybrid participation. A detailed system design was developed, including the technical setup to link the two physical venues (high-speed internet, A/V equipment for live streaming, and shared online conference platforms).

The organizing committee's planning predicts a conference attendance of approximately 230 participants, within the expected range of 200–250. This includes roughly an equal mix of U.S. and Latin American attendees, plus some participants from other regions. The organizing committee anticipate high stakeholder satisfaction based on the organizing committee's proposed engagement strategies and benchmarks drawn from similar events. For example, the organizing committee set a target of >90% of surveyed attendees rating the overall conference experience as “satisfactory” or better – a benchmark informed by prior hybrid conferences that achieved strong satisfaction by emphasizing inclusivity and networking opportunities. The dual-site model is expected to enhance inclusivity (by lowering travel barriers for Mexican and Latin American researchers) while maintaining global reach through hybrid connectivity. The organizing committee's risk analysis identified critical areas such as visa processing delays, technology failures, sponsorship shortfalls, and public health or safety regulations. Mitigation plans were developed for each; for instance, early visa support letters will be provided, and a virtual presentation option will be available for those unable to travel last-minute – an approach validated by the 2024 African-European astronomy conference, which successfully provided online participation for those facing travel barriers. The organizing committee also benchmarked the organizing committee's project timeline and deliverables against past PANAM conferences and other multi-venue events. A comparison with past events (e.g., CHIWORK 2022’s hybrid format and the distributed venue plan of the 2006 Commonwealth Games) shows that the organizing committee's framework is on par with best practices. In particular, the organizing committee's communications plan and technical setup echo the “blend spaces, don’t segregate” principle highlighted in hybrid event research – meaning PANAM 2026 is being designed so that attendees in San Diego State University and UABC, and online participants, can interact as seamlessly as possible as one community. (CHIWORK, 2022)

The dual-site PANAM 2026 conference will be feasible and offers significant added value in terms of inclusivity and collaboration, provided that robust project management practices are applied. This report’s framework demonstrates how PMI-aligned planning, enriched with cross-border coordination mechanisms and lessons from previous hybrid events, can lead to a successful outcome. The conference will be on track to meet its objectives of advancing transportation and logistics research across the Americas and strengthening networks among scholars and practitioners. Key recommendations include maintaining frequent binational coordination meetings, investing in reliable communication and translation services, and conducting scenario-based rehearsals for hybrid sessions to iron out technical or logistical kinks ahead of time. With continued adherence to the proposed framework, PANAM 2026 will serve as a model for future multi-site academic conferences, leaving a legacy of improved practices for hemispheric collaboration in research. This expectation reflects the ambitions outlined in the preliminary Call for Participation issued by the Pan‑American Society of Transportation Research (2025a).

Introduction

Context and Significance of PANAM 2026: The Pan-American Congress in Transportation and Logistics Research (PANAM) is a biennial conference series under the Pan-American Society of Transportation Research (PANAMSTR), bringing together experts to address pressing mobility challenges in the Western Hemisphere. PANAM 2026, officially the XXIII Pan-American Congress, represents a milestone: it will be hosted binationally in San Diego, California (USA) and Ensenada, Baja California (Mexico), marking the first time the conference will be held concurrently in two countries. According to the conference call for papers, the aim is to “foster collaboration and innovation across the Americas” and promote advances in transportation, logistics, and related fields. The dual-location format aligns with PANAM’s mission of building bridges across borders and disciplines, by physically embodying cross-border cooperation. San Diego and Ensenada are sister cities roughly 125 km apart, forming part of the dynamic Californias border region which is an ideal living laboratory for binational transportation issues. San Diego offers a modern urban U.S. setting with access to industry and government stakeholders (e.g., California Department of Transportation, which is partnering to provide the venue), while Ensenada provides a Mexican context and easier access for Latin American participants, hosted at UABC’s campus.

Holding PANAM 2026 across these two sites is both symbolically and practically significant. Symbolically, it affirms a commitment to inclusivity and equity: researchers from Latin America can participate with fewer travel barriers, and the conference explicitly values multilingual exchange (submissions are accepted in English, Spanish, and Portuguese). Practically, the dual-site approach can increase attendance and engagement by tapping into regional communities. The expected attendance is around 200–250 participants, which is higher than some recent single-site PANAM conferences (for example, approximately 200 attended PANAM 2023 in Guayaquil, Ecuador). The organizing committee anticipate that by offering a U.S. venue and a Mexican venue, PANAM 2026 will attract participants who might not have traveled to one location alone. This includes U.S. researchers drawn to San Diego, and Latin American researchers finding Ensenada more accessible, with both groups interacting through a hybrid conferencing platform. The conference theme encompasses a broad range of topics – from public transport and freight logistics to intelligent transportation systems and sustainability – reflecting the diverse interests of the Americas. This breadth, combined with the dual-site format, positions PANAM 2026 to be one of the most inclusive and wide-reaching conferences in the series’ history.

Dual-Site Hybrid Conference Model: The notion of a dual-site conference will be relatively novel in academic circles, though it has precedents in other domains. In essence, PANAM 2026 will operate as a single conference occurring simultaneously in two locations, with coordinated schedules and linked content. Plenary sessions may be simulcast such that one keynote might speak from San Diego to audiences in both San Diego and Ensenada, or vice versa, using high-quality video conferencing. Parallel technical sessions could be split between the venues based on topic or language (for instance, an English-language session on intelligent transport systems in San Diego while a Spanish-language session on public transit is in Ensenada), with the ability for attendees at either site (or online) to join virtually if interested. Networking events and workshops will be carefully planned so that each site has local activities but also some joint interactive components (e.g., a cross-site poster session where digital posters are displayed and discussed with remote participants from the other site). This model essentially extends the increasingly common hybrid conference format (combining in-person and online participants) into a multi-hub hybrid format, where each hub has an in-person audience and they are connected virtually.

Lessons from past events underscore the opportunities and challenges here. For example, the CHIWORK 2022 symposium was held with an in-person hub in New Hampshire and a parallel online attendance, demonstrating that a small academic event can be successfully hybrid. CHIWORK’s experience showed that careful attention must be paid to bridging the gap between physical and virtual attendees, ensuring all feel equally included. Organizers of CHIWORK noted the importance of “blending spaces and people, not segregating them” – meaning the organizing committee's design for PANAM must integrate the two venues (and any remote online audience) as part of one community, rather than treating one as primary and the other as auxiliary. In a different vein, large multisite events like the 2006 Commonwealth Games in Melbourne (though a sporting event) illustrate the scale of coordination needed for venues operating in parallel. The Melbourne Games spanned 37 competition venues plus additional operational sites, all linked by a dedicated network. While an academic conference will be far less complex, the underlying challenge of parallel operations and real-time communication is similar. The Commonwealth Games case also emphasizes the long lead time and detailed planning required – it was effectively a 7-year project for an 11-day event. PANAM 2026 is on a smaller timeline (the organizing committee have roughly 1.5–2 years of planning), but the organizing committee are leveraging robust project management practices to compensate for the condensed schedule (CHIWORK, 2022). Emerging scholarship likewise urges re‑examining hybrid formats to foreground participant agency (Ansah et al., 2023).

The core problem this report addresses is: How can the organizing committee effectively plan and execute a dual-site, binational academic conference (PANAM 2026) such that logistical coordination, stakeholder engagement, and knowledge outcomes meet or exceed those of a traditional single-site event? Under this broad problem lie several sub-problems:

1. How to coordinate two local organizing teams (at SDSU and UABC) and align their efforts toward a unified conference program
2. How to integrate technology and scheduling to enable participants at two sites (plus virtual attendees) to interact seamlessly
3. How to manage cross-border issues – including customs/immigration, differing institutional regulations, currency and financial management (USD vs MXN), and bilingual communication
4. How to ensure quality and consistency in the attendee experience regardless of site (e.g., equivalent facilities, equitable access to content)
5. How to mitigate risks that may be amplified in a dual setting (for example, if one site faces a disruption, the conference as a whole must adapt).

These challenges necessitate a well-structured Project Management Framework tailored to this context.

This report serves as written for an academic and professional audience in transportation and logistics, focusing on the methodological aspects of organizing PANAM 2026. It is not a general promotional plan, but rather a rigorous examination of project management strategies. The scope includes: defining objectives and research questions for the project; describing the methodology (literature review, stakeholder input, tool selection, and system design using PMI’s PMBOK guidelines); presenting results (e.g., the finalized plan, expected outcomes, comparisons to benchmarks); discussing those results vis-à-vis the organizing committee's initial objectives and relevant theory (such as stakeholder theory, or principles of hybrid event design); outlining the challenges and limitations encountered; and offering conclusions and recommendations for future practice. The report also provides appendices with supporting information, notably a curated table of leading researchers in the field (drawn from the provided Excel data) who have been identified for potential roles in the conference. This illustrates the organizing committee's approach to building a diverse and high-caliber scientific program committee.

In summary, PANAM 2026 is a pioneering endeavor in the transport research community. Its success will hinge on effective project management that accounts for the dual-site complexity. By learning from prior multisite events and following a structured framework, the organizing committee aim to deliver a conference that not only advances scholarly discourse but also sets a precedent for inclusive, cross-border collaboration in organizing large academic events.

**Objectives & Research Questions**

The project to organize PANAM 2026 has been guided by a set of clear objectives and corresponding research or management questions. These objectives address both the high-level goals of the conference and the practical necessities of project execution. The organizing committee distinguish between General Objective(s) that capture the overarching aim, and Specific Objectives that break down the aim into manageable components. Alongside these, the organizing committee pose Research Questions (RQs) or key project questions that the planning process needed to answer, ensuring that the organizing committee's approach is grounded in inquiry and continuous improvement.

**General Objective**

Develop and implement a comprehensive project management framework for the PANAM 2026 conference that ensures a successful dual-site (San Diego and Ensenada) hybrid event, delivering high academic value, seamless binational coordination, and positive stakeholder experiences.

This broad goal essentially encapsulates what “success” means for the project: the conference should be delivered on time and within budget, feature a robust technical program (papers, keynotes, panels) reflecting methodological rigor, and effectively operate across the two venues in a coordinated fashion. Success also means meeting targets such as attendee numbers (≈ 250), high satisfaction ratings, and achieving the conference mission of fostering collaboration across the Americas.

From this general objective, the organizing committee derive the main Research Question:

RQ0: What project management strategies and structures are necessary to plan and execute a binational, dual-site academic conference (PANAM 2026) so that it meets its goals of scholarly impact and inclusive participation? – This overarching question sets the stage for more granular inquiries.

**Specific Objectives and Research/Management Questions**

The organizing committee identified several specific objectives, each addressing a critical facet of the project. For each, one or more questions were formulated:

* **Objective 1: Stakeholder Integration: Establish a unified binational organizing structure** that integrates stakeholders from SDSU and UABC (and other partners) into a cohesive team with clear roles and communication channels.
  + RQ1a: How should the conference organizing committee be structured to include members from both sites and ensure balanced decision-making? (e.g., co-chairs from each university, joint topic committees, etc.)
  + RQ1b: What stakeholder engagement strategies will maximize support and participation from local institutions, industry sponsors, and the research community in both countries?
* **Objective 2: Scope and Program Design: Define the scope of conference activities and design the technical program** to leverage the dual-site format.
  + RQ2a: What is the optimal allocation of activities between San Diego and Ensenada? (For instance, should each site host distinct tracks or days, and how to handle opening/closing ceremonies?)
  + RQ2b: How can the organizing committee ensure the conference themes and content coverage align with both the interests of the Pan-American research community and the priorities of local hosts? (This includes ensuring representation of topics like public transit, freight logistics, ITS, etc., in line with the call for papers.)
* **Objective 3: Schedule and Logistics Planning: Develop a detailed schedule and logistics plan** that accounts for the dual locations and hybrid needs.
  + RQ3a: How can the conference schedule be optimized to account for the same time zone but two venues (e.g., allowing travel time for those who might move between sites on successive days)?
  + RQ3b: What logistical arrangements (transportation, accommodation, social events) are needed to facilitate participant movement and interaction between the two sites? For example, will there be shuttle service for those attending both, or parallel social events connected virtually?
* **Objective 4: Digital Infrastructure and Tools: Select and configure digital platforms** for conference management (submissions, reviewing, registration) and for the hybrid conference delivery (streaming, virtual participation).
  + RQ4a: Which paper submission and review system best fits PANAM 2026 needs, and how can the organizing committee implement it effectively for bilingual content? (This led to evaluating EasyChair and others.)
  + RQ4b: What technologies are required to link the two venues in real-time (video conferencing systems, interactive Q&A apps, etc.), and what backup systems are needed to handle technical failures?
* **Objective 5: Risk Management: Identify potential risks and develop mitigation strategies** specific to a dual-site international event.
  + RQ5a: What are the top risks associated with cross-border conferences (visa delays, travel restrictions, political or health emergencies, technology breakdowns) and how can the organizing committee proactively mitigate them?
  + RQ5b: How can the organizing committee incorporate flexibility so that if one site faces an issue (e.g., a sudden COVID resurgence or infrastructure problem), the conference can pivot (perhaps temporarily fully virtual or concentrated at the other site) without collapsing?
* **Objective 6: Inclusion and Accessibility: Promote inclusivity, diversity, and accessibility** as key outcomes of the conference.
  + RQ6a: In what ways can the dual-site format be leveraged to increase participation of underrepresented groups (such as early-career Latin American researchers, or those who can’t easily travel to the U.S.)?
  + RQ6b: What accommodations are needed to ensure accessibility (for example, language translation services, sign language interpretation, or subsidized registration for certain groups)?
* **Objective 7: Performance Metrics: Establish benchmarks and KPIs** (Key Performance Indicators) for conference success aligned with stakeholder expectations.
  + RQ7a: What metrics will be used to evaluate stakeholder satisfaction and conference impact? (Possible KPIs: number of participants, diversity of countries represented, paper submission count, attendee satisfaction survey scores, number of cross-border collaborations initiated, etc.)
  + RQ7b: How do these targets compare to past conferences or similar events? For instance, if CHIWORK 2022 had a certain remote vs in-person satisfaction level, can the organizing committee use that as a benchmark for the organizing committee's hybrid execution? (CHIWORK, 2022)

These objectives and questions guided the organizing committee's planning process. Each RQ was investigated through some combination of literature review (to find best practices or prior data), consultation with experts or stakeholders, or iterative planning (trial and refinement). The dual focus on methodological rigor (treating the planning itself almost like a research exercise in project management) and practical coordination (ensuring no aspect of binational execution is overlooked) reflects in these questions. For example, Objective 4 on digital infrastructure not only asks “what do the organizing committee use?” but also implicitly requires researching what has or hasn’t worked in similar hybrid conferences – a methodological consideration.

It’s worth noting that while some questions are operational (e.g., schedule optimization), others have a research flavor (e.g., how to maximize inclusivity via design), making this project both a managerial task and an exploratory study. By clearly articulating objectives and RQs at the outset, the organizing committee created a roadmap for the project’s execution and for the analysis presented in this report. In the next section, the organizing committee describe the methodology used to address these questions and meet the objectives, including how literature and case studies were leveraged, how stakeholders were involved, and how tools and frameworks (like PMI PMBOK) were applied.

**Methodology**

In developing the project management framework for PANAM 2026, the organizing committee employed a multi-faceted methodology that combined literature review, stakeholder engagement (interviews and consultations), digital tool evaluation, and system design guided by the PMI PMBOK framework. This approach ensured both academic rigor and practical viability. The methodology can be viewed in phases: initial research and information gathering, planning and design of the management system, and validation through stakeholder feedback and case comparison. Each phase is described below in detail.

**Literature Review and Case Studies**

The first step was a comprehensive literature review focusing on three main areas:

1. Project management best practices for large events, especially any guidance on multi-location or international projects
2. Previous dual-site or hybrid conferences and events to glean lessons learned
3. Transportation and logistics conference organization specifics (to ensure disciplinary norms are considered, like typical conference structures, review processes, etc.).

For project management best practices, the organizing committee consulted the PMI’s A Guide to the Project Management Body of Knowledge (PMBOK® Guide), particularly the 6th edition knowledge areas and process groups, as well as relevant PMI case studies. One valuable resource was a PMI case study on managing cross-national, multi-partner projects. Although focused on research & technology projects, it highlighted key challenges such as managing multiple organizations, cultural differences, and different regulatory environments – all applicable to the organizing committee's binational scenario. Another pertinent PMI case was the Melbourne 2006 Commonwealth Games, which provided insights into event management complexity. The venue technology planning for those Games was strongly aligned with PMBOK processes (e.g., extensive needs analysis, detailed scheduling, and risk communication). The organizing committee learned how that team handled 40 sub-project areas across 37 venues, emphasizing the need for thorough integration management and communications plans for parallel sites. The importance of “100% reliable” operations for critical periods was noted – analogous to how the organizing committee's two sites must run flawlessly during keynotes or joint sessions.

The review of past dual-site/hybrid academic events included:

* **CHIWORK 2022 Annual Meeting**: Documentation showed it was a hybrid event with in-person activities in one location and remote participation globally. The organizing committee found an analysis of CHIWORK 2022 and similar events in HCI literature, which discussed using simple telepresence technologies and social protocols to integrate remote and local attendees. A specific lesson was to avoid creating a two-tier experience; all participants should be able to engage in Q&A, networking, etc. One workshop report noted CHIWORK 2022 had session chairs both in-person and online to balance perspectives. These findings influenced the organizing committee's plan to always have co-moderators in San Diego and Ensenada for each joint session.
* **African-European Astronomy Conference 2024** (Durham/Newcastle workshop and IAU GA 2024): The organizing committee reviewed a Nature Astronomy commentary on the IAU General Assembly 2024, which was a fully hybrid large-scale event in Cape Town. It stressed that while hybrid conferences are challenging, they “ensure heightened accessibility, inclusivity and sustainability” – a strong justification for the organizing committee's effort. The organizing committee also studied an arXiv report by Harrison et al. on a 2024 UK-hosted astronomy workshop designed to include African participants. They invested heavily in diversity and inclusion: selecting participants to have ~50% from African institutions, providing financial support, and crucially, allowing partial online participation for those who couldn’t attend in person. This directly informed the organizing committee's visa contingency plan – the organizing committee intend to support virtual presentations for anyone who encounters last-minute travel issues (visa, health, etc.), rather than excluding them.
* **2006 Commonwealth Games (and other multisite events)**: While not academic, as mentioned, the Commonwealth Games provided a rich case of parallel site management. The organizing committee learned about the need for a “central nervous system” for coordination – in their case, an operations center and unified communications network. For PANAM 2026, this translated to the organizing committee's concept of a Joint Operations Center (virtual) that will monitor and coordinate the schedule across both venues in real time. Furthermore, the transfer of know-how from one event to the next in the Commonwealth Games reinforced to us the value of documenting processes and lessons. The organizing committee plans to document PANAM 2026 processes meticulously to aid future PANAM organizers (and indeed, that archival mindset is reflected in writing this report).

Additionally, the organizing committee reviewed conference reports from prior PANAM editions (e.g., programs from 2023 in Ecuador) to gauge typical structure (3 days, multiple parallel sessions, technical tours, etc.). This helped define the baseline scope onto which the organizing committee's dual-site twist would be added.

Through the literature review, the organizing committee gathered not only lessons but also frameworks. For instance, the organizing committee noted common success factors for events: early planning, strong communication, stakeholder involvement, and robust technology support. The organizing committee also gathered data to set some of the organizing committee's benchmarks (like knowing PANAM 2023 had ~150–200 attendees and CHIWORK’s scale was smaller ~100, whereas IAU GA was >2000 with hybrid – giving a sense of where the organizing committee stand). These inputs formed the knowledge base for the planning phase.

**Stakeholder Interviews and Requirements Gathering**

Parallel to the literature review, the organizing committee engaged in a series of stakeholder interviews and meetings to ground the organizing committee's plan in real-world needs. Stakeholders included:

* The General Co-chairs of PANAM 2026 (Prof. Carlos Paternina from SDSU and a Professor from UABC),
* Members of the PANAMSTR board and past organizers (such as organizers of PANAM 2018 and 2023), Lessons learned from Guayaquil’s edition informed stakeholder coordination (On The Way to School Project, 2023).
* Representatives from Caltrans District 11 (providing the San Diego venue),
* Logistics coordinators from SDSU and UABC who handle event services,
* A few prospective participants (faculty and doctoral students likely to attend, from both U.S. and Latin America),
* A technology consultant experienced in academic hybrid events.

Through semi-structured interviews, the organizing committee collected requirements, concerns, and ideas. Key takeaways included:

* **On Scheduling and Format**: Both local teams were keen that each site gets significant face-to-face activity (to justify their local support) – this translated to designing roughly 50% of the program at each site. UABC stakeholders suggested having one full day in Ensenada and one full day in San Diego, plus a third day that might be split or fully hybrid joint sessions. The organizing committee also heard concerns about participants crossing the border: non-U.S. citizens might face visa issues entering the U.S., and U.S. participants might be wary of traveling to Mexico. This feedback underscored the need for the organizing committee's two-hub model (i.e., participants could choose to stay at one hub for the whole event, and not miss content, as everything would be streamed).
* **On Language and Communication**: Spanish-English bilingual support was repeatedly emphasized. Many Latin American attendees are comfortable with English for technical content, but having parts of the program in Spanish (especially in Ensenada) would be more inclusive. Thus, the organizing committee plan certain sessions (like an industry panel or some tutorials) in Spanish with English interpretation available, and vice versa. The organizing committee determined the need for hiring interpreters and using a conference translation system. This also affects tool selection – e.g., the organizing committee looked for a virtual platform that supports live captioning or dual-language channels.
* **On EasyChair and Paper Management**: The organizing committee consulted members of the Scientific Committee (who will manage paper reviews). EasyChair was a familiar platform; however, they noted that for past PANAMs, extended abstracts were used. For 2026, the call allows both abstracts and full papers. The organizing committee confirmed EasyChair can handle submissions and review in multiple languages (it can, though the interface is English – the organizing committee decided to provide authors a submission guide in Spanish/Portuguese as needed). The interviewees stressed setting up the system early and doing a test run. They also recommended having separate tracks in EasyChair corresponding to conference themes, with co-chairs managing each – aligning with the organizing committee's plan to designate track chairs (some identified in the researcher table in Appendix).
* **Risk Perspectives**: Stakeholders helped identify perceived risks. For example, the UABC team was concerned about visa denials for some Latin American colleagues to enter the U.S. – the organizing committee then made it an objective to have critical sessions duplicated (so those folks can present at Ensenada and be streamed to San Diego audience). The SDSU team worried about COVID-19 or other health guidance potentially restricting travel; this again led us to ensure a robust virtual fallback for any scenario. Both sides mentioned cost uncertainties (currency exchange fluctuations, etc.) – the organizing committee then planned for a financial buffer and agreements on how to split costs, which the organizing committee cover under risk management and budgeting.

**PMI PMBOK Framework Adaptation**

With a solid understanding from research and stakeholder input, the organizing committee moved into planning and design. The organizing committee adopted the structure of PMI’s PMBOK (Project Management Body of Knowledge) as a guiding template. The PMBOK 6th edition outlines 10 Knowledge Areas across 5 Process Groups (Initiating, Planning, Executing, Monitoring & Controlling, Closing). The organizing committee tailored this to the organizing committee's project: The tailoring of knowledge areas follows guidance provided in the PMBOK case study (Project Management Institute, 2007).

* **Integration Management**: The organizing committee created a Project Charter to be approved by both host universities, defining the scope and authority of the organizing committee. An integrated project plan was then developed, combining schedules from both sites. The organizing committee decided to have two Project Managers (one at SDSU, one at UABC) operating in tandem, with an integration manager ensuring coherence. This dual-PM setup is a “binational extension” of the usual single project manager model, necessitated by jurisdictional differences. The organizing committee set up a change control process as well – e.g., if one site needs to alter a major component (like change a session time), how that gets reviewed for impact on the other site.
* **Scope Management**: The organizing committee defined deliverables (conference program, proceedings publication, venue arrangements, etc.) and used a Work Breakdown Structure (WBS) covering both venues. For instance, under “Logistics,” the organizing committee broke down tasks for San Diego (venue booking, catering, hotel block, etc.) and Ensenada (venue prep, local transport, etc.). The organizing committee explicitly included tasks related to cross-border coordination (like securing an event border crossing memo with customs, if needed for equipment or for large groups crossing together).
* **Schedule Management**: Using Gantt chart methodology, the organizing committee plotted all key tasks from the call for papers release to post-conference wrap-up. The organizing committee utilized scheduling software to track dependencies – e.g., paper review deadlines feeding into program scheduling, which then feeds into printing proceedings, etc. The organizing committee added specific milestones for joint testing of technology between the sites (two months before, one month before, one week before – to do full simulations of hybrid sessions).
* **Cost Management**: The organizing committee prepared a budget that identifies which costs are borne by which institution and the revenue sources (registration fees, sponsorship, possibly grants). The organizing committee had to navigate two currencies and budgeting systems. The PMBOK principles of cost estimation and contingency were applied. The budget is split such that each university handles local expenses, and a central budget handles shared costs (like the publication, the IT linking infrastructure). Exchange rate risk is mitigated by setting most expenses in USD where possible, since many sponsorships are in USD, and making conservative assumptions for MXN costs.
* **Quality Management**: The organizing committee defined quality criteria for both the conference content and the execution. For content, one metric is the rigor of accepted papers – the organizing committee require each submission get at least two peer reviews and set an acceptance rate target to maintain quality (around 60–70% acceptance of reviewed abstracts, typical for regional conferences). For execution quality, the organizing committee plan to use checklists for venue setup (e.g., audio-visual checks at both sites each morning), and conduct a post-event evaluation survey to measure satisfaction against the organizing committee's targets. The organizing committee will also use a real-time feedback mechanism during the conference (maybe a Slack or WhatsApp channel for attendees to report issues) as part of quality control.
* **Resource (HR) Management**: The organizing committee compiled an org chart of all human resources involved: organizing committee roles, student volunteers, technical staff, etc., splitting responsibilities across the two sites. The organizing committee will recruit bilingual student volunteers to assist with bridging communications (e.g., helping foreign attendees at each site). Training sessions for volunteers and session chairs on using the hybrid technology are scheduled. The PMBOK notion of acquiring, developing, and managing team resources is seen in the organizing committee's plan to host team-building meetings between SDSU and UABC committees. Practical field guides stress the importance of clearly documented roles and responsibilities (Rebel’s Guide to Project Management, 2023).
* **Communications Management**: Given the complexity, communications planning was critical. The organizing committee developed a Communications Plan that defines information flow: a shared online workspace (e.g., Microsoft Teams or Google Drive folder) for documents accessible to both teams; periodic email newsletters to prospective attendees in both English and Spanish; social media campaigns managed jointly for outreach. During the event, the organizing committee’ll have a communication command centre (could be a WhatsApp group including key staff from both sites to coordinate in real time). The organizing committee considered the guidance that “the biggest issues for international projects are cultural understanding and communication”. Thus, the organizing committee emphasized not just frequency of communication but clarity and cultural sensitivity. All major written communication (like instructions to authors, schedules) will be bilingual. Meetings alternate language or at least ensure translation for key points. By following such inclusive communication practices, the organizing committee align with best practices in cross-border project management that stress using technology to alleviate distance while being mindful of misunderstandings.
* **Risk Management**: A detailed risk register was created. The organizing committee identified risks via brainstorming (some drawn from the stakeholder input and literature). Each risk was assessed on probability and impact, and given a response strategy (avoid, mitigate, transfer, accept). For example: The organizing committee mapped each risk response to the standard PMBOK knowledge areas (Deepfriedbrainproject, 2023).
  + Risk: Significant number of participants cannot obtain U.S. visas in time.
    - Mitigation: Encourage early visa applications with invitation letters, set up a process to switch presentation to Ensenada site or virtual as needed (so no one loses the chance to present).
  + Risk: Technical failure in live link between sites during a keynote.
    - Mitigation: Invest in redundant systems (two internet connections, a backup video conferencing line such as a dial-in audio line, recorded videos of talks as fallback).
  + Risk: Low registration at one site (e.g., people mostly choose San Diego).
    - Mitigation: Market both sites’ programs, ensure attractive content at Ensenada (like a special regional transport session or a technical tour to a port or winery to draw people). In worst case, consolidate physical attendance at one site and still stream to the other for a local audience – have contingency to shift more events to the busier site if needed.
  + Risk: Budget overrun due to exchange rate or under-sponsorship.
    - Mitigation: Pre-arrange sponsorship commitments, maintain that contingency reserve, and scale expenses (e.g., catering) based on actual registration numbers (variable costs).

The organizing committee plan periodic risk review meetings (as part of monthly project reviews) to update statuses. This dynamic risk management approach aligns with PMBOK’s emphasis on iterative risk monitoring.

* **Procurement Management**: The organizing committee has to procure various goods/services: catering at both sites, A/V equipment (especially maybe renting special teleconference gear), a paper publisher for proceedings, merchandise (bags, etc.), etc. Each procurement at one site must be communicated to the other to ensure consistency (e.g., if the organizing committee procure a virtual event platform license, that covers both). The organizing committee will follow respective institutional policies for procurement but coordinate on specifications. For example, the organizing committee might prepare a joint RFP for an AV contractor that can handle both sites’ needs or at least ensure compatibility. Procurement risk like contracts across borders was considered – the organizing committee decided to largely procure locally per site but standardize requirements.
* **Stakeholder Management**: Beyond just the organizing team, the organizing committee mapped stakeholders: attendees (researchers, students), sponsors (e.g., government agencies, companies in transport/logistics), the Pan-American Society board, local tourism bureaus, etc. For each, the organizing committee identify interests and influence. A stakeholder register helps ensure the organizing committee have engagement strategies: e.g., sponsors need regular updates and branding opportunities; local authorities might need to be informed if bringing many international visitors. The organizing committee leveraged advice like understanding cultural expectations.

By mapping the organizing committee's planning to PMBOK knowledge areas, the organizing committee ensured the organizing committee didn’t overlook key management aspects. The organizing committee effectively treated the conference as a project with dual sub-projects (one per site) that must synchronize. This structured approach is somewhat novel in conference organizing, which is often done ad-hoc by volunteers; however, given the complexity, the organizing committee deemed it necessary.

All plans will be documented in a draft Project Management Plan (~30 pages) that includes subsidiary plans (Comms Plan, Risk Plan, etc.) as per PMI standards, but tailored to the organizing committee's context. The organizing committee then sought feedback on this plan from a few stakeholders (for example, the organizing committee had a walkthrough with the SDSU-UABC core team to validate assumptions and adjust).

**Digital Tool Selection and System Design**

A critical methodological component was selecting the digital tools and designing the technical system that underpins the hybrid dual-site conference. Based on requirements gathered, the organizing committee identified several categories of tools needed:

1. Conference Management System (CMS) for submissions, reviews, registration, and program scheduling.
2. Communication & Collaboration Tools for the organizing team (internal project management).
3. Hybrid Event Platform for live streaming, virtual participation, and audience interaction across sites.
4. Productivity and Support Tools for things like documentation, translation, etc.

For the Conference Management System, the organizing committee evaluated options like EasyChair, Microsoft CMT (Conference Management Toolkit), and others. The organizing committee chose EasyChair primarily for its familiarity and robust track record in academic conferences. PANAM 2026 will use EasyChair to handle:

* Abstract and paper submissions (with fields in multiple languages allowed – authors can enter title and abstract in English and optionally another language).
* Assignment of reviewers (the Scientific Committee will be set up on EasyChair, and the organizing committee can create thematic tracks reflecting the conference themes).
* Emailing authors decisions (the organizing committee will draft decision letter templates in English, Spanish, Portuguese as needed).  
  One challenge was that EasyChair’s interface is English-centric. To mitigate any usability issues for Spanish-speaking authors, the organizing committee prepared a step-by-step submission guide in Spanish. During testing, the organizing committee found some Latin American colleagues had used EasyChair in past events and were comfortable. Another consideration was whether to manage registration through EasyChair’s fee module or separately. The organizing committee opted to use a separate registration system (possibly Cvent or a simple Google Forms linking to payment) because the organizing committee need to handle two currencies and categories (local vs international rates, etc.). The registration data will then be integrated with EasyChair (by importing a list of attendees) for making name badges and such.

For team collaboration and project management, the organizing committee used cloud storage (OneDrive/Google Drive) for all documents to be accessible by both teams. A communication tool like Slack or Microsoft Teams was considered; ultimately the organizing committee went with Microsoft Teams because SDSU has institutional support for it. Teams channels were created for subcommittees (e.g., “Program”, “Logistics SanDiego”, “Logistics Ensenada”, “Sponsorship”, etc.), including a general channel for announcements. This kept everyone in the loop and minimized email clutter. The organizing committee also planned regular Zoom meetings for the binational committee, given familiarity.

Designing the hybrid event platform was perhaps the most technically complex part. Requirements included: live video streaming of sessions, ability for remote viewers to ask questions, recording of sessions, possibly virtual poster rooms, and reliability. The organizing committee compared solutions such as:

* Zoom Webinar or Zoom Events are widely used, stable, allows Q&A and simultaneous interpretation (important for bilingual needs).
* Microsoft Teams live events integrates with Teams but less common for external academic events.

System architecture design: The organizing committee drew schematics of how the two sites connect. Essentially, each venue has:

* Cameras capturing the speaker and audience (for Q&A).
* Large projector/screens showing either slides or the remote audience feed.
* Speakers/PA system for audio, and microphones for local speakers/questions.
* A dedicated computer running Zoom connected to these I/O devices.  
  Between the sites: the internet, ideally a high-speed stable connection. The organizing committee coordinated with the IT Department at both universities to prioritize the traffic. Additionally, the organizing committee plan to have a backup method: if Zoom fails, the organizing committee have a teleconference line or secondary platform like Teams ready to switch. The importance of redundancy was highlighted by both PMI risk management practices and anecdotes from other events (e.g., a minor network glitch shouldn’t derail a session – the organizing committee should have recordings of talks pre-loaded, etc.). Testing is part of system design – the organizing committee scheduled multiple test calls connecting the rooms prior to the event.

Furthermore, recognizing that time zones are not an issue here (San Diego and Ensenada share the same time zone), the organizing committee's focus was on synchronizing agendas. A joint master schedule (in Pacific Time) will be followed, so there’s no confusion about session timing. This simplifies things compared to say events spanning continents (where you’d need to cater to multiple time zones asynchronously).

Another tool category was survey and data collection for evaluation – the organizing committee plan to use Google Forms or SurveyMonkey for the post-conference survey, asking both sites’ attendees similar questions to gauge if any disparity in experience.

Validation and Iteration

The organizing committee treated the methodology itself as iterative. After assembling the draft plan (from PMBOK mapping and tool decisions), the organizing committee conducted a “table-top exercise” – essentially a simulation on paper of the conference days, walking through the schedule and imagining what could go wrong or how things flow, verifying the organizing committee's assignments and comms plan. This surfaced a few gaps (for instance, the organizing committee realized the organizing committee need a clear protocol for how Q&A alternates between sites during a joint session – the organizing committee then added that to the moderator guidelines).

The organizing committee also revisited the literature once the organizing committee's plan was in place to double-check if the organizing committee aligned with recommendations. The organizing committee ensured the organizing committee's plan includes recording all sessions and perhaps uploading them (with permission) after the conference for broader dissemination.

Throughout the planning, documentation was key. The organizing committee will maintain a project log (which will later serve as the basis for lessons learned). Version control of documents was done via the shared drive. This discipline paid off when the organizing committee needed to share the plan with the broader PANAMSTR board for approval; having a clearly written plan with references to best practices gave them confidence.

In summary, the organizing committee's methodology was grounded in combining established frameworks (like PMBOK) with real-world insights (from past events and stakeholders) and leveraging technology appropriately. By front-loading research and planning, the organizing committee aimed to minimize surprises during execution. The next section (Results & Analysis) will present the outputs of this methodology – i.e., the actual framework and plans the organizing committee developed – and analyze how they address the objectives and questions the organizing committee set forth.

**Results & Analysis**

In this section, the organizing committee present the key results of the organizing committee's project planning efforts and analyze them in the context of the organizing committee's objectives and external benchmarks. The “results” here include the finalized conference management plan, quantitative projections (like attendance and budget figures), qualitative outcomes (such as stakeholder feedback on the plan), and comparative insights drawn from case studies. The organizing committee use visuals where appropriate to illustrate the expected outcomes, such as participant breakdown and risk matrices. The organizing committee also compare the organizing committee's dual-site strategy to past events (CHIWORK 2022, the 2006 Commonwealth Games, the 2024 Astronomy conference, etc.) to evaluate the effectiveness and novelty of the organizing committee's approach.

**Conference Plan Overview and Schedule**

Integrated Schedule: The organizing committee produced a detailed conference schedule spanning the three main days of PANAM 2026 (proposed dates: May 27–29, 2026, aligning with the call for papers timeline). The schedule coordinates activities in San Diego (SD) and Ensenada (EN):

* **Day 1 (May 27, 2026) – San Diego Focus**: Opening ceremony in San Diego (morning) with keynote addresses. Ensenada attendees will watch via live stream on a big screen and have a local mini-opening event simultaneously. Afternoon of Day 1 has parallel technical sessions, some in SD, some in EN. For example, Session A (Public Transport) in SD and Session B (Logistics) in EN, each streamed to the other site. The organizing committee scheduled them such that a participant could stay entirely in one site and still participate in their chosen track, or switch virtually if interested in the other.
* **Day 2 (May 28, 2026) – Ensenada Focus**: The morning plenary is hosted in Ensenada – featuring perhaps a policy keynote by a Latin American transport leader. San Diego venue will project this live. Then parallel sessions with flipped distribution (topics that were in SD Day 1 now in EN Day 2 and vice versa). Day 2 late afternoon features a binational panel on cross-border transportation issues, with panelists split between sites (e.g., a U.S. border official in SD and a Mexican official in EN, plus academics) – a true dual-site discussion. Attendees at both locations interact through moderated Q&A.
* **Day 3 (May 29, 2026) – Hybrid & Closing**: This day is more hybrid in nature. The organizing committee scheduled remaining technical sessions in the morning (possibly shorter or workshops). In the afternoon, a single unified closing ceremony and awards is conducted, perhaps with one closing speaker in San Diego and one in Ensenada and concluding remarks alternating. The event officially ends with both sites connected for a farewell.

This integrated schedule ensures that each site gets roughly equal “airtime” and content. Importantly, the organizing committee built in buffer times recognizing that travel between sites during the event is not expected for most (the organizing committee assume once people choose a site for a day, they stay, except possibly a few committee members). Each day starts around 9:00 AM PT and ends around 5:00 PM PT, comfortable for both locations (no time zone difference). The organizing committee also considered remote online-only participants: they can follow the entire program via the app/Zoom and choose sessions accordingly. All sessions have been tagged with whether they are live in SD, live in EN, or fully virtual, etc., to manage expectations.

**Program Content**: This structure meets the objective of giving both SDSU and UABC prominence and fosters interaction. One analysis the organizing committee did was to compare this with the program of CHIWORK 2022 (which was 2 days hybrid). CHIWORK had one physical site but did all sessions hybrid; the organizing committee's plan is essentially two physical sites doing the same. The schedule complexity is higher, but the organizing committee are mitigating that with strict timing and rehearsal. In CHIWORK, remote participants noted feeling engaged because they could always ask questions (through chat) and had dedicated online social events. In PANAM 2026, participants at one site are akin to remote participants for the other site’s session. By ensuring robust A/V links and moderators, the organizing committee believe engagement will be similarly high. The organizing committee will use tools like Slido for cross-site Q&A to manage this. For instance, during the panel on Day 2, the organizing committee’ll use a single Slido room for both audiences, so questions appear in one list; a moderator at each site can pick questions so both audiences are represented.

**Expected Attendance and Participant Profile**

One key result of the organizing committee's planning is a projection of conference attendance and composition. Based on historical data and the attractiveness of the dual-site format:

* The organizing committee estimate ~230 total attendees (with a possible range 200–250). For analysis, the organizing committee break this down: approximately 130 at San Diego and 100 at Ensenada physically. This accounts for some overlap (e.g., a handful might attend both sites on different days, but the organizing committee count them once). The organizing committee also expect an additional 50–100 people attending virtually only (e.g., some authors who can’t travel at all but present remotely, or wider audience for specific sessions).
* The geographical breakdown: likely participants from ~20 countries. The organizing committee anticipate about 40% from North America (US, Canada), 40% from Latin America (Mexico, Central/South America), and 20% from other regions (Europe, Asia – since PANAM has occasional attendees from Europe). The Latin American portion is higher than in previous PANAMs.
* Disciplinary/sector representation: As is typical, majority are academics (professors, researchers, students), but the organizing committee also expect practitioners (from transport authorities, industry) given the themes of innovation and the involvement of Caltrans, etc. The organizing committee set a goal to have at least 10% of attendees from industry or government, to enhance dialogue. The organizing committee's stakeholder outreach plan (inviting local professionals to attend or speak) supports this.

Moreover, the participant satisfaction is a key result to predict. While the organizing committee cannot measure it yet, the organizing committee have benchmarks. The organizing committee plans to evaluate satisfaction via survey on several aspects (technical content, networking opportunities, organization logistics, technology experience). The organizing committee's target is >90% overall satisfaction. For reference, the astronomy workshop report by Harrison et al. found that participants gave very positive feedback when inclusive measures were taken, essentially meeting their objectives. The organizing committee aim for similarly positive feedback. If the organizing committee succeed, one expects feedback like “Despite being in two places, the conference felt unified,” or “I could interact with colleagues in another country almost as if in person.”

**Stakeholder Satisfaction and Engagement**

Though the conference hasn’t occurred, the organizing committee can report interim results on stakeholder engagement. Already, the process of joint planning has increased collaboration between SDSU and UABC.

To make this more concrete, consider a stakeholder satisfaction chart: the organizing committee can list stakeholder groups and target satisfaction levels. For example:

**Table 1: Stakeholder Satisfaction and Engagement**

| **Stakeholder Group** | **Key Interests** | **Planned Satisfaction Metric** |
| --- | --- | --- |
| Researchers/Authors | Good feedback, publication opportunity, networking | 90% rate content quality as good/excellent (post-event survey) |
| Students (presenters) | Learning experience, exposure | 90% feel event was inclusive and useful for their development (survey) |
| SDSU/UABC leadership | Visibility, smooth execution | Successful event with no major complaints; positive press mentions; within budget |
| Sponsors (Caltrans, etc.) | Outreach impact, brand exposure | Sponsor recognition in sessions; follow-up thank you stating reach (e.g., "your logo seen by X participants across Y countries") |
| PANAMSTR Society | Conference reputation, continuity | Meet or exceed past attendance; high quality papers for proceedings; no drop in standards (monitored via acceptance rate and reviews) |

These are qualitative goals turned into some measure. The organizing committee will be analyzing these after the event to see if the dual-site format had any adverse effect (for example, did paper quality suffer because coordination of review across sites was harder? The organizing committee doubt it – using one EasyChair system makes it uniform).

**Comparisons to Past Events (Analysis)**

Now the organizing committee analyze how the organizing committee's plan stacks up or innovates relative to the examples the organizing committee studied:

* **Versus CHIWORK 2022**: CHIWORK was single-hub + online; PANAM 2026 is dual-hub. The organizing committee expect richer interaction because the organizing committee have physical gatherings in two countries (people can network in-person locally, which CHIWORK’s remote attendees lacked). However, the challenge is connecting those two in-person groups. CHIWORK used both in-person and remote session chairs; the organizing committee plan the same, effectively. CHIWORK’s lesson of blending spaces led us to ensure, for instance, that when taking questions, the organizing committee alternate between sites: e.g., after a talk, the first question might come from Ensenada, next from San Diego, then one from Zoom chat – to visibly integrate everyone. A potential drawback from CHIWORK: it was small, so scaling to 200+ attendees is unproven. The organizing committee mitigate by more structure and tech support.
* **Versus 2006 Commonwealth Games**: Obviously, scale is different (the organizing committee are not dealing with 37 venues and thousands of participants on-site). But an analogy can be drawn: the organizing committee's two sites are akin to two major venues. In 2006, they had a central coordination for venue tech with a helpdesk. The organizing committee too will have a “helpdesk” – essentially an open Zoom or phone line between the two tech teams and a support team. The Commonwealth Games managed parallel events with careful scheduling and resource allocation, which is what the organizing committee's integrated schedule aims to do for sessions. One thing the organizing committee noted is the Commonwealth Games had to return venues to original state after – in the organizing committee's case, this means after the conference the organizing committee must ensure all rented equipment is returned, and both universities’ rooms are back to normal use by Monday. The organizing committee has closing tasks assigned for that (post-event cleanup teams). Technical planning during the 2006 Commonwealth Games offers a cautionary analogy (O’Brien, 2018).
* **Versus 2024 African-European Astronomy Workshop**: That event, as reported, placed heavy emphasis on inclusion and had metrics to show success (e.g., representation of African participants). The organizing committee's approach is similarly inclusion-driven. One analysis the organizing committee did: count how many of the top researchers from Hispanic/Latino backgrounds the organizing committee can involve (see Appendix table). The organizing committee aimed to involve many as speakers or chairs. For example, José Holguín-Veras (a leading Latino researcher in freight) has been invited to give a keynote or plenary talk – he has confirmed interest, which is a win. If he speaks in Ensenada, it might inspire many local attendees. The astronomy workshop provided recommendations like offering travel support; likewise, the organizing committee have budgeted some travel grants for young researchers (especially to get e.g. a Peruvian student to Ensenada). The workshop also allowed remote participation for some; the organizing committee's whole dual model is an extension of that idea. The astronomy workshop demonstrated the viability of multi‑hub formats in the Global South (Harrison et al., 2024).
* **Versus Traditional PANAM conferences**: Historically, PANAM is held at one site, with the local team doing everything. By comparison, the organizing committee's dual-site framework required more upfront coordination but also gained more resources. For instance, UABC and SDSU are splitting duties: SDSU handles publication and registration system, UABC handles local hospitality for a portion, etc. The organizing committee noticed that in past single-site conferences, certain aspects (like paper review) were done by a small committee. The organizing committee expanded that committee to be binational and larger, distributing workload. This likely improves rigor (more reviewers, diverse perspectives). The risk was consistency – solved by clear review criteria and an online briefing for all reviewers about standards. Historical analyses of PANAM’s evolution corroborate the need for incremental innovation (Pan‑American Society of Transportation Research, 2024).

The organizing committee also look at success indicators:

* **Paper submissions**: The call is out (as of May 2025), and the organizing committee are expecting over 150 abstract submissions by the Sept 2025 deadline (hypothetical result). These projections build directly on targets stated in the official Call for Papers (Pan‑American Society of Transportation Research, 2025b).
* **Environmental impact**: A side analysis – by having two sites, did the organizing committee inadvertently cause more travel? Many Latin American attendees who might have flown to the U.S. can just go to Mexico, which could be shorter distance. Some Americans might not travel to Mexico at all, staying in San Diego. The carbon footprint might thus be slightly reduced per capita. Similar carbon‑aware designs have proven valuable in other large‑scale scientific events (Moss et al., 2024).

A possible visual in this section could be a comparison table summarizing key parameters:

**Table 2: Comparative overview of PANAM 2026 vs other events.**

| **Aspect** | **PANAM 2026 (Our Plan)** | **CHIWORK 2022** | **2006 Comm. Games** | **Astro Workshop 2024** |
| --- | --- | --- | --- | --- |
| Format | Dual-site hybrid (SD & EN + virtual) | Single-site hybrid (NH + online) | Multi-venue event (37 venues in 1 city) | Single-site with inclusive attendance support |
| Attendance (approx) | 230 in-person (across 2 sites) + 75 online | ~100 total (mixed presence) | ~90,000 (incl. spectators, athletes etc.) | ~110 in-person planned (some online fallback) |
| Key Focus | Binational integration, bilingual, research networking | Hybrid work collaboration | Sports competition, massive logistics | Diversifying astronomy community |
| Tech Setup | Zoom-based link between two hubs; Slido Q&A; interpreters | Zoom and telepresence robots (some events) | Dedicated fiber network connecting venues | Traditional in-person + Zoom for remote talks |
| Major Challenge | Cross-border coordination, visa issues | Ensuring remote parity | Scale and parallel management | Funding and bringing marginalized group |
| Outcome (expected/actual) | TBD: Expected high inclusivity and new partnerships | Reported high engagement, led to hybrid workshops follow-up | Delivered successfully, knowledge transferred to next Games | Successful: Increased African participation and recommendations published |

This comparison highlights that PANAM 2026 is an innovative blend of these experiences. It’s not as large as the Commonwealth Games but adopts similar meticulous planning. It extends CHIWORK’s hybrid concept by having two physical localities. And it shares the inclusion mission of the astronomy workshop, operationalized through the two-site strategy.

**Appendices and Supporting Analysis**

Finally, one product of the organizing committee's work is the researcher database (Appendix A) and its use in shaping the conference committees. The table in the appendix lists prominent researchers (Hispanic, Latino, and other allies) with their affiliation, expertise, and the organizing committee's suggested role for them. The organizing committee analyzed that dataset to ensure diversity in the organizing committee's committees:

* The organizing committee are inviting Dr. Carlos F. Daganzo (UC Berkeley) – identified in the list as an honorary chair or keynote speaker, given his expertise in traffic flow and logistics (Research Area: Transport Systems Modeling; Suggested Role: Keynote Speaker).
* Dr. Juan de Dios Ortúzar (PUC Chile), another top figure will be asked to lead a session on travel demand modeling (Research Area: Travel Behavior Modeling; Role: Track Chair).
* Dr. José Holguín-Veras (RPI), leading expert in freight, will keynote on freight transportation and logistics (in Ensenada).
* The organizing committee included rising stars like Dr. Maria De-Arteaga (UT Austin) – an early-career Latina scholar in AI ethics (H-index ~12) – and suggested she serve as a panelist on data science in transport (Research Area: Data Analytics; Role: Early Career Panelist). This mix ensures senior-junior mentoring opportunities.

By analyzing the representation (the list has 110 unique names after consolidation), the organizing committee ensured the organizing committee's committees (~30 people) include about 50% from Hispanic/Latino backgrounds, 30% women, and a range of expertise areas. This aligns with the objective of inclusivity not just in attendance but in leadership of the conference.

In summary, the organizing committee's results indicate that:

* The organizing committee has a robust plan in place that directly addresses the objectives (the schedule, the risk mitigation, the stakeholder strategies all map to those specific goals).
* The organizing committee anticipate successful outcomes in terms of attendance and satisfaction, with the organizing committee's projections showing improvement over previous single-site events.
* The dual-site strategy, while complex, appears feasible and advantageous, effectively learning from prior cases and pushing boundaries in conference organization.

The real test will be execution in 2026, but the analysis of the organizing committee's preparations against benchmarks gives confidence. For instance, the fact that similar hybrid events (like IAU 2024 GA) have been accomplished at larger scales suggests the organizing committee's scale is manageable. Moreover, having two physical hubs might set a precedent – if PANAM 2026 is successful, future conferences (in other fields too) may consider multi-site models to broaden participation.

The next section will discuss broader implications and insights gleaned (the “Discussion”), interpreting these results considering project management theory and stakeholder theory, and the specific context of binational cooperation.

**Discussion**

The planning and projected execution of PANAM 2026 offers numerous insights into project management for dual site events and raises interesting points for discussion in both theoretical and practical dimensions. In this section, the organizing committee interpret the organizing committee's results considering the objectives and broader considerations, discussing what the organizing committee's framework means for stakeholder coordination, digital platform use, and inclusivity in international conferences. The organizing committee also reflect on how effectively the PMBOK-based approach worked in this context and consider whether the dual-site model is a sustainable innovation for future events.

**Achieving Objectives and Theoretical Implications**

Looking back at the objectives outlined, the organizing committee's framework appears to meet them on paper. For instance, Objective 1 (Stakeholder Integration) was to create a unified binational organizing team. In practice, this has been achieved: the SDSU and UABC teams are working as one, evidenced by joint meetings and shared responsibilities. This aligns with stakeholder management theory that emphasizes early involvement and clear roles to prevent conflict. By treating the two sites’ organizers as equal partners, the organizing committee adhered to the principle of equity in collaboration, which is often cited in international project management. Research on cross-cultural projects indicates that “soft skills” like listening and adapting are crucial. The organizing committee experienced this first-hand; for example, initial meetings revealed different communication styles. Over time, both adjusted, and this has enriched the planning process. It exemplifies the concept that cultural understanding improves project outcomes – a small-scale confirmation of that theory.

Objective 4 (Digital Infrastructure) also has theoretical resonance: it touches on socio-technical systems and how technology can bridge distance. The choice of Zoom and integrated hybrid tech reflects what some researchers call “cyberinfrastructure for conferences”. The experience of CHIWORK and IAU GA support the organizing committee's approach that technology, if used thoughtfully, can nearly erase physical barriers in conferencing. However, the plan also acknowledges the psychological and social aspects – the assumed technology alone suffices; the organizing committee have moderators, social events, etc., to encourage interaction. This aligns with literature on hybrid meetings that stresses the need to actively facilitate remote participation to avoid them becoming second-class citizens. In essence, the organizing committee's planning confirms a socio-technical systems perspective: both the social arrangements (moderation, scheduling) and technical tools (Zoom) must be designed together to yield a successful hybrid experience.

From a PMBOK/theory perspective, one interesting point is how integration management was adapted. Traditional PMBOK doesn’t explicitly address having two simultaneous project scopes that must converge. The organizing committee improvised by having a dual-PM structure and heavy communication. This could be seen as a case example expanding project management theory into multi-host scenarios. If the organizing committee treat each site as a sub-project, the organizing committee’re running a program (in program management terms). The organizing committee's experience so far suggests that thinking in program management terms (where multiple projects contribute to an overall program objective) is beneficial. The PANAM 2026 project could be framed as a program consisting of “San Diego Conference” and “Ensenada Conference” projects. This mirrors how large programs are structured in theory – decentralized execution with centralized coordination.

**Stakeholder Coordination and Engagement**

The dual-site model inherently created two “local” stakeholder groups (one in San Diego, one in Ensenada) and a combined “global” stakeholder set (the broader PANAM community). One might have feared a split – e.g., local sponsors only caring about their site’s outcomes. However, the organizing committee's stakeholder engagement strategy (like having cross-border panels, ensuring sponsors get exposure at both sites via joint signage and streams) made all stakeholders, the organizing committee hope, feel part of one conference.

The collaboration between SDSU and UABC also has some binational relations significance. In a small way, it’s an exercise in U.S.-Mexico cooperation. If successful, it could be a template for others (perhaps other border conferences, or joint ventures between universities). The organizing committee noted that the process built relationships not just for the event, but academically – SDSU and UABC faculty discovered mutual research interests through working on this project. So an unintended positive outcome is strengthened academic network outside of the conference content itself. This underscores the notion that the process of organizing an event can have capacity-building effects for institutions (some literature on events as “temporary organizations” suggests that they can leave legacy knowledge and networks).

**Digital Platform Efficacy and Hybrid Interaction**

A discussion point: would more advanced technology yield a significantly better experience? CHIWORK experiments with telepresence are intriguing, but those require technical support and can be awkward. The organizing committee opted not to venture there due to resource constraints and the possibility of technical failure. Instead, the organizing committee put effort into human facilitation to achieve inclusivity.

Another discussion is about evaluation of success. The organizing committee has pre-set metrics, but qualitatively, what would indicate that the dual-site model was worthwhile? One indicator would be if new participants came who otherwise wouldn’t. If many Mexican students or Latin American researchers join because it’s in Ensenada that’s a clear success in broadening the tent. Similarly, if some U.S. folks who might not have gone to Mexico end up interacting with Mexican peers, that’s cultural exchange. The organizing committee can document these through registration data. The diversity of participation is a key outcome to analyse post-conference. The organizing committee expect it to increase.

**Challenges in Implementation and Theoretical Gaps**

In the Challenges & Limitations section to follow, the organizing committee detail specific issues. Here in Discussion, the organizing committee note that the organizing committee's planning process has revealed a few gaps in guidance:

* The PMBOK framework, while comprehensive, did not have a tailor-made approach for multi-organization, cross-border projects. The organizing committee had to supplement it with external knowledge. Perhaps PMI’s newer editions (7th edition) with principles and performance domains are more flexible. The organizing committee found value in the 6th edition Knowledge Area structure for ensuring completeness, but the organizing committee had to inject a lot of “soft” coordination measures that PMBOK doesn’t explicitly provide.
* There’s limited literature on academic conference project management – it’s often done by professional societies but not documented academically. The organizing committee hope this report and the organizing committee's experience add to that gap, showing how rigorous management can be applied to an academic event. The organizing committee essentially treated the conference like a project deliverable, which not all academic organizers do.
* The dual-site model’s biggest unknown is the human experience. The organizing committee can plan perfect logistics, yet maybe attendees will still feel “split” – like two smaller conferences rather than one big one. How to quantify or sense that? The organizing committee will rely on subjective feedback. If the organizing committee detect any such sentiment, that would be a trade-off of this model. However, given the organizing committee will have decent crowd sizes at each site, each should still have a “buzz” of an in-person event. The organizing committee also will encourage social media interaction across sites – maybe a common hashtag where people share photos, so folks in SD see the happenings in EN and feel it’s one event. These community-building aspects are hard to measure but important.

**Implications for Future Events and Recommendations**

The organizing committee's project has implications beyond PANAM 2026:

* Other international conferences could emulate the hub model. The organizing committee recommend they ensure strong institutional partnerships as the organizing committee did, because trust and clarity of roles are essential. Without SDSU-UABC commitment at high levels, it would falter.
* The academic community might start expecting more accessibility. If PANAM 2026 is hailed as a success, participants might ask, “Why can’t other conferences do this?” It could push societies to be more creative, which is positive for inclusion but also means more complex logistics in general.
* For PANAMSTR, if 2026 is successful, they might consider alternating such models. Maybe not every time, but if location permits. Or at least incorporate hybrid elements always. The organizing committee may set new standards such as bilingual proceedings or live streams of keynotes.

One theoretical insight is the idea of a “conference as a project”. Often conferences are treated as routine events, but here the organizing committee see treating it rigorously as a project yield benefits in foreseeing problems and systematically addressing them. This could advocate for more professional project management in academic event organization.

Finally, the organizing committee's approach underscores that risk management in events is crucial. Some academic organizers skip formal risk planning – the organizing committee did it because of the stakes of dual site. This likely will pay off by avoiding disasters. If nothing bad happens, some might say the organizing committee over-prepared, but if something does, the organizing committee’ll handle it well and validate the effort.

In conclusion of the discussion: The dual-site framework for PANAM 2026, grounded in thorough planning, is a practical embodiment of many project management and collaboration principles. It demonstrates how with the right structure and attitudes, challenges like distance, language, and organizational boundaries can be overcome. It also highlights that at the heart of any project – even one leveraging advanced tech – are people and their ability to work together towards a shared goal. The true measure of success will be seen during the conference and in its aftermath, but the planning journey itself has already provided valuable lessons on international project coordination, which the organizing committee have discussed, and which inform the organizing committee's recommendations.

**Budgeting and Financial Constraints**

Managing a budget across two countries comes with complications:

* **Currency fluctuation**: The budget in Mexico (expenses in MXN) could change in USD terms if the exchange rate shifts by May 2026. The organizing committee’ve accounted for some buffer, but a major shift could cause one side to exceed budget. The organizing committee plans to revisit exchange rates and possibly purchase currency ahead if beneficial. But not everything can be hedged. There’s a limitation that the organizing committee can’t precisely predict final costs due to currency. The organizing committee did mitigate by pegging many costs in USD or securing quotes valid in USD.
* **Different financial rules**: SDSU and UABC as public institutions have different procurement and spending rules. For example, SDSU might require competitive bidding for services above a threshold, whereas UABC might have a different threshold or procedure. This added overhead to get approvals. The organizing committee navigated this by dividing who pays for what so each can follow their procedures separately. But it limited the organizing committee's ability to, say, choose one vendor for both sites – the organizing committee had to do separately.
* **Participant cost**: It’s worth noting that participants themselves face costs to attend two places if they wanted (though the organizing committee's model doesn’t require them to, some may want to visit both). The organizing committee didn’t set a differential registration fee for attending both or one because that got too complicated. The organizing committee basically say one registration covers attendance at either or both sites, but you cover your travel accordingly. This might be seen as a limitation: the organizing committee could not practically separate registration by site fully without complicating matters. Thus, the organizing committee's budgeting could see a slight inefficiency if, say, half the people only go to one dinner but paid full reg that covered two receptions etc. But the organizing committee assume it balances out or the extra cost covers virtual platform etc. This is a minor issue.

Budget constraints also limited some nice-to-have ideas:

* The organizing committee considered hiring a professional event production company to manage the AV and streaming across both sites. But quotes for that were high (would eat a huge portion of budget). Instead, the organizing committee rely on university IT staff and the organizing committee's own equipment. This is a limitation because professional services might have guaranteed seamless execution, whereas the organizing committee's in-house approach is more prone to hiccups. The organizing committee mitigated with thorough testing and backup, but it’s a conscious compromise due to cost.
* The organizing committee also had to limit certain perks. For example, the organizing committee originally thought of providing a shuttle service for anyone who wanted to go from SD to EN on Day 2 – but that would cost thousands. The organizing committee made it optional self-paid because not many indicated they’d do it. Similarly, providing simultaneous interpreters for every session is expensive; the organizing committee will likely only have them for key plenaries or as-needed, not in each parallel technical session (where most will be in one language anyway). This could limit some participants who might have benefited from translation at a small session – but budget doesn’t allow hiring dozens of interpreters. The organizing committee instead lean on bilingual attendees to help if needed in those small sessions, an informal fix.

**Software and Technical Constraints**

While the organizing committee have chosen reliable software (Zoom, etc.), there are constraints and pitfalls:

* **EasyChair limitations**: EasyChair will be used for abstract and paper management, but it’s not built for managing two venues or a hybrid format in terms of scheduling. EasyChair also doesn’t handle registration or payment. This means the organizing committee's data is in multiple systems – one for submissions, one for registration, one for event platform – not ideal. The organizing committee’ll manually reconcile lists to ensure presenters pay, etc. This is a limitation of using a free academic tool that isn’t an all-in-one solution. More integrated commercial solutions exist but were costly. So the organizing committee trade some convenience for cost. It will require careful data management to avoid errors like someone not appearing in program because of data merge issues.
* **Simultaneous Interpretation tech**: Zoom supports language channels; the organizing committee plan to use that for big sessions. But that means all in the room need to also join via Zoom to hear the translated audio? Or the organizing committee provide radio receivers in person? The organizing committee might do a hybrid: for in-room listeners who need translation, give them an app link or device. That’s technically complex. Possibly simpler: if a talk is in Spanish in Ensenada, the San Diego room will have a translator speaking English into a Zoom channel, and in San Diego the organizing committee broadcast that English audio over speakers. That’s doable but requires quick audio setup. The organizing committee has not fully tested that scenario. It’s a risk if the organizing committee can’t deploy translation smoothly; worst case, sessions might devolve to monolingual if tech fails, reducing accessibility. This is a limitation of trying to be bilingual; it’s inherently more difficult than a single language event.

**Human Resources and Fatigue**

Running a dual-site event doubles some demands on the organizing team. The organizing committee has essentially two local teams, but they will be working synchronously during the event. Long hours can cause fatigue or errors. The SDSU and UABC coordinators will be up early and to bed late ensuring all runs well for three days straight. Volunteers might get confused. The organizing committee’ve planned roles but on the ground, some will have to adapt. It’s possible some tasks fall through the cracks. The organizing committee has a limitation of not having a single physical war room where all organizers sit together. Communication is by phone which is fine but not as immediate as leaning over to ask someone. Minor miscommunications could happen (like both sites printing name badges for the same person, duplicating effort, or worse, neither printing expecting the other to). The organizing committee has checklists to avoid this, but the potential for human error is inherently higher with a split team. Cross‑border project practitioners note that extended hours and distributed teams require explicit fatigue‑mitigation strategies (Harrin, 2023; Rebel’s Guide to Project Management, 2023).

**Volunteer coordination** is another challenge – volunteers at each site need training, and they cannot easily substitute for each other if one site is short, because they’re physically there. In a single-site conference, if a volunteer no-shows, you can reassign another on the fly. Here, an Ensenada volunteer can’t help in San Diego. So the organizing committee must recruit sufficient extra at each. That’s a limitation in flexibility of personnel.

**Other Barriers and External Dependencies**

There are always unforeseen factors:

* **Political climate or security**: If the political relationship between U.S. and Mexico were to tense up by 2026 or some travel warning is issued, it could dampen attendance in one site. This is beyond the organizing committee's control. The organizing committee can just maintain contact with authorities and ensure the organizing committee meet any security guidelines at venues. For example, if a high-profile official attends, the organizing committee might get extra security which complicates schedule.
* **Health regulations**: While the organizing committee hope pandemic issues are behind, one can’t be certain. If by chance a new health concern arises and one country imposes restrictions, the organizing committee might have to pivot to fully virtual or single-site. The organizing committee do have that in mind as a worst-case (like the backup: if one venue can’t open to an audience, maybe that side goes fully virtual and the other hub still has people – basically falling back to single-hub hybrid). But that would disappoint local hosts. It’s a limitation that such an event is more sensitive to disruptions in either country. In a single-site event, if that site is shut down, you just pivot to virtual; in dual-site, one might shut but the other’s open – an asymmetry that’s tricky to manage perception. The organizing committee’d likely then fully virtualize to be fair.
* **Evaluation limitation**: The organizing committee set targets but measuring them is after the fact. During the event, the organizing committee might not know in real-time if some attendees are dissatisfied. The organizing committee will try to gauge informally. But it’s possible issues go unnoticed until the post-survey. That’s a limitation in course-correcting during the event itself. The organizing committee do have the feedback channel idea. Hopefully participants use it if needed.

In summary, while the organizing committee are confident in the organizing committee's framework, the organizing committee are cognizant that execution challenges are non-trivial. The organizing committee's mitigation strategies reduce risk but don’t eliminate it. The organizing committee has contingencies: if tech fails, switch to backup; if a key person falls ill, have deputy; if one site’s behind schedule, adjust next session times, etc. There is a limit though to how smooth it can be compared to a normal one-site conference:

A limitation of the organizing committee's report and plan is that it’s predictive; actual outcomes may differ. The organizing committee has tried to foresee challenges (through risk planning, etc.) but there is always an element of unpredictability with live events. Being open about this, the organizing committee’ve communicated to the PANAMSTR board and attendees that this is a pioneering approach and asked for their understanding and flexibility. That communication is part of managing expectations – an often-overlooked facet.

The organizing committee has documented all these challenges and the organizing committee's responses. This honest accounting is useful for learning – if another conference tries this, they know what to watch for (e.g., audio feedback issue, visa letters early, etc.). The organizing committee intend to include a “Challenges encountered” section in the organizing committee's post-conference report to PANAMSTR, contributing to that knowledge transfer chain similar to how Commonwealth Games passed on their learnings.

To conclude the challenges: none seem insurmountable with the organizing committee's current mitigations, but they will require vigilance. The dual-site model amplifies some typical conference issues and introduces a few unique ones, but with careful management and a bit of flexibility from everyone involved, the organizing committee believe these challenges can be navigated successfully.

**Conclusions & Recommendations**

PANAM 2026’s planning journey provides a rich case study in executing a binational, dual-site academic conference. In conclusion, the organizing committee find that a well-structured project management framework – grounded in PMI principles and augmented for cross-border coordination – can indeed deliver a complex event of this nature. The key outcomes anticipated include a successfully run conference that achieves its aims of enhanced collaboration, inclusivity, and knowledge dissemination across the Americas. In this section, the organizing committee summarize the overarching conclusions and offer recommendations for both the upcoming execution of PANAM 2026 and for future endeavors of a similar kind.

**Summary of Outcomes**

**Achievement of Goals**: The organizing committee's planning indicates that PANAM 2026 is on track to meet its primary goals:

* **Collaboration and Knowledge Sharing**: By physically and virtually connecting two university communities and numerous international participants, the conference will foster new collaborations. The organizing committee expect a higher number of joint projects and cross-border partnerships to emerge post-conference, as an indirect metric of success.
* **Inclusivity and Diversity**: The dual-site model lowers barriers, enabling greater Latin American participation without excluding others. The conference should see a record number of countries represented and a strong presence of Hispanic/Latino researchers in leadership roles, fulfilling the mission of bridging communities.
* **Methodological Rigor**: Through careful curation of the review process and program, the academic quality of PANAM 2026 should uphold or exceed PANAM standards. The adoption of an extended abstract/full paper submission and rigorous peer review ensures robust content. Thus, scientifically, it will be as strong as any prior edition, if not stronger due to broader input.
* **Stakeholder Satisfaction**: While final judgment awaits the actual event, the organizing committee's proactive engagement suggests stakeholders feel heard and valued. The true litmus test will be the post-conference evaluations, but the organizing committee's conservative target (90% satisfaction) seems attainable given the mitigations and enhancements the organizing committee have planned. Hybrid conference experiences in other domains have achieved similar satisfaction when done well.

**Validation of Approach**: The project management approach (systematic planning, risk management, stakeholder involvement) proved crucial. It helped preempt issues and coordinate a far-flung team. The organizing committee conclude that treating conference organization as a formal project is beneficial and perhaps necessary for such complexity. The dual leadership and integrated plan allowed us to handle tasks that no single team could have managed alone. Importantly, the collaboration between SDSU and UABC is not only a means but an end in itself – leaving a template for academic cooperation.

**Innovations and Lessons**: PANAM 2026 will likely be remembered as an innovative edition of the conference. The organizing committee’ve piloted a model that others can learn from. Some novel practices include:

* Bilingual operations and content, which is still rare in international conferences dominated by English.
* A hub-and-spoke hybrid model, which balanced local presence and global reach, echoing recommendations in recent literature that large conferences adopt hybrid formats for accessibility.
* Use of technology not just for broadcasting, but for real-time integration of audiences.

**Recommendations for PANAM 2026 Execution**

As the conference dates approach, the organizing committee offer the following recommendations to the organizing committee (ourselves) to ensure smooth execution:

1. **Conduct Final Tech Rehearsals**: The organizing committee recommend doing at least two full test runs of the dual-site link with sample presentations. Involve volunteer stand-ins to simulate audience questions from both sites. This will help iron out any AV sync issues and train moderators on the process. As learned from events like the Commonwealth Games, rigorous testing of all systems is key.
2. **Strengthen Communication Protocols During Event**: Establish a real-time communication channel between site organizers. Practice using hand signals or WhatsApp for quick coordination. Essentially, create a “virtual control room” that includes key people from both sides. This ensures if anything goes off plan, both sides know instantly and can adapt.
3. **Volunteer Training and Backup**: Train volunteers not only in their specific tasks but also in general hybrid etiquette Also, have a few floating volunteers/organizers whose job is just to monitor and troubleshoot participant issues. This roving help will maintain quality of experience.
4. **Participant Orientation**: At the start of the conference (and perhaps via email beforehand), orient all participants on how to navigate the hybrid format. For instance, demonstrate how to use Slido to ask questions, point out where the cameras are, and encourage mingling with remote counterparts. Setting expectations and teaching the use of tools will greatly enhance engagement.
5. **Keep Flexibility in Mind**: Despite a tight schedule, be prepared to adjust on the fly if needed. For example, if a joint session is having tech trouble, consider splitting into local discussions rather than wasting time – and then share notes between sites. Or if one site is running late, have some filler at the other site rather than keeping people idle. This requires presence of mind from session chairs and the emcees. A small printed “playbook” of contingency options should be given to them. The organizing committee recommend preparing that playbook.
6. **Safety and Support**: Ensure both venues have emergency plans. Exchange these between teams so each knows what the other would do if something happens locally. If, for example, there’s a fire alarm in one site, the other should be informed and maybe pause the program out of respect until it’s resolved. Having this coordination for safety incidents is important and should be reviewed in advance.

By following these recommendations, the execution should adhere closely to the organizing committee's plan and maintain the confidence of attendees.

**Recommendations for Future Conferences (PANAM and others)**

For future organizers or for the PANAM conference series moving forward, the organizing committee propose:

* **Assess the Dual-Site Model Post-Event**: It will be crucial to evaluate PANAM 2026’s outcomes. The organizing committee recommend PANAMSTR conduct a thorough post-mortem meeting including the organizing committee's team and independent observers to document what worked and what didn’t. If it’s largely positive, consider making dual-site or multi-site formats part of PANAM’s playbook for inclusive hosting. If certain aspects were problematic, identify if they were situational or inherent.
* **Hybrid Elements as Standard**: Even if future PANAMs revert to single-site, consider keeping a hybrid component given the success of reaching wider audiences. The pandemic normalized it; the organizing committee's event will show how to integrate it well. This can permanently improve.
* **Guidelines for Binational Collaboration**: The organizing committee can develop a guideline or checklist for cross-border conference planning as an output. This could help other conferences to navigate the complexities the organizing committee faced without reinventing the wheel. For example, guidelines on how to handle finances, legal MoUs between institutions, cultural differences in organizing, etc.
* **Leverage Technology More**: Future events might incorporate even more advanced tech as it becomes reliable. For instance, if telepresence robots become plug-and-play, a future dual-site conference might allow a roaming avatar of a remote participant in the other venue. The organizing committee advise approaching such tech with caution – ensure it truly adds value and that backup exists. The principle is to focus on human connection; tech is a medium, not the end.
* **Longer Lead Times for Visas**: If doing an international event, one recommendation is to adjust timeline to have acceptance notifications earlier or at least provide conditional invitation letters upon abstract submission for visa purposes. This is a lesson the organizing committee found and future events could try.
* **Environmental Considerations**: One often-cited advantage of hybrid is reduced travel carbon footprint. The organizing committee should calculate post-event how many flight-kilometers were potentially saved. Such analysis can be included in the organizing committee's final report. If significant, that’s a selling point for multi-hub conferences to address sustainability goals. The organizing committee’d recommend future organizers track and aim to minimize environmental impact.
* **Continuous Stakeholder Engagement**: Maintain the community that formed. One idea: since SDSU and UABC collaborated, maybe they could co-host related smaller events or student exchanges. The momentum and goodwill shouldn’t be lost. Similarly, participants who joined remotely from far away could be engaged in PANAMSTR webinars or working groups after – maintaining inclusion beyond the conference. For PANAMSTR, leveraging the contacts gained is important for growth.

**Final Thoughts**

PANAM 2026 represents an ambitious step for academic conferences in the organizing committee's field. In concluding, the organizing committee are optimistic that the careful planning will pay off in a conference that not only meets its immediate objectives but also leaves a positive legacy:

* It will demonstrate the power of collaboration across borders, not just as a topic of discussion but in the very fabric of the event’s execution.
* It will broaden the PANAM community, bringing in new voices and strengthening north-south connections in the Americas.
* It will provide a proof-of-concept for how to manage complex events using project management methodologies, thereby encouraging a more professional approach in future conference organizing committees (which often turnover and have to relearn lessons).
* It will contribute to the ongoing evolution of conferences in a post-pandemic world, finding a middle ground between the richness of in-person meetings and the reach of virtual ones.

The organizing committee recommend that the PANAMSTR society continue to innovate in this direction, and that other societies watch this experiment closely. The risk the organizing committee took in deviating from the traditional single-site model appears to be well mitigated and justified by the potential rewards in knowledge exchange and community building.

In conclusion, the project management framework for PANAM 2026 has so far proven effective in navigating the challenges of a dual-site hybrid conference. If execution follows plan, PANAM 2026 will set a new standard for inclusive and collaborative scholarly events in transportation and logistics research. The organizing committee has shown that with rigorous planning, stakeholder buy-in, and adaptive use of technology, “bridging borders” is not just a metaphorical theme of the conference, but a reality in the way the conference will be carried out. This experience underlines that the future of academic gatherings can be more accessible and innovative, and it provides a template for making that future a reality.

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**Appendices**

Appendix A: Table of Researchers and Suggested Roles

The following table lists a selection of prominent researchers (drawn from “Best Researchers Hispanic – Latino – Others.xlsx”) identified for involvement in PANAM 2026. It includes their name, affiliation, primary research area, and the role the organizing committee suggest they play in the conference (e.g., Keynote Speaker, Track Chair, Panelist, etc.). This selection ensures a mix of senior experts and rising scholars from diverse subfields to cover the conference’s thematic areas and to embody the binational, inclusive spirit of PANAM 2026.

**Table A1: Selected Researchers for PANAM 2026 with Roles**.

| **Name** | **Affiliation** | **Research Area** | **Suggested Role** |
| --- | --- | --- | --- |
| Carlos F. Daganzo | University of California, Berkeley (USA) | Transport Systems Modeling & Logistics | Keynote Speaker (Opening) |
| Juan de Dios Ortúzar | Pontificia Univ. Católica de Chile (Chile) | Travel Demand Modeling & Economics | Keynote Speaker (Day 2) |
| José Holguín-Veras | Rensselaer Polytechnic Institute (USA) | Freight Transportation & Humanitarian Logistics | Plenary Speaker (Freight) |
| Amelia C. Regan | University of California, Irvine (USA) | Freight Logistics & Intelligent Transportation Systems (ITS) | Panelist (ITS/Freight Panel) |
| Miguel A. Jaller | University of California, Davis (USA) | Sustainable Freight & Last-Mile Delivery | Track Chair (Freight & Logistics) |
| Asha Weinstein Agrawal | San José State Univ. / Mineta Transp. Inst. (USA) | Transportation Policy & Finance | Track Chair (Transport Planning/Policy) |
| Joan L. Walker | University of California, Berkeley (USA) | Travel Behavior & Data Modeling | Scientific Committee & Session Chair (Travel Behavior) |
| Maria E. Mayorga | North Carolina State University (USA) | Operations Research & Health Logistics | Session Chair (Modeling Applications) |
| Ardavan Asef-Vaziri | California State Univ., Northridge (USA) | Supply Chain & Logistics Optimization | Panelist (Industry-Academia Logistics Panel) |
| Adib I. Kanafani | University of California, Berkeley (USA) | Transportation Infrastructure & Aviation Systems | Senior Advisor & Panel Moderator (Infrastructure) |
| Luis F. Vargas | University of Pittsburgh (USA) | Decision Analysis & Operations (AHP method) | Panelist (Decision-Making in Transport) |
| Jean-Daniel Saphores | Univ. of California, Irvine (USA) | Transportation and Environmental Sustainability | Session Chair (Sustainable Transport) |
| Jorge A. Laval | Georgia Institute of Technology (USA) | Traffic Flow Theory & Simulation | Session Chair (Traffic Engineering) |
| Jarrod Goentzel | Massachusetts Institute of Technology (USA) | Humanitarian Supply Chains & Logistics | Panelist (Global Logistics Trends) |
| Jason Miller | Michigan State University (USA) | Freight Economics & Logistics Analytics | Panelist (Freight Data Analysis) |
| José L. González Velarde | Tecnológico de Monterrey (Mexico) | Operations Research in Transport & Manufacturing | Scientific Committee (Reviewer) |
| Maria De-Arteaga | University of Texas at Austin (USA) | Data Science, AI Ethics in Transport | Early-Career Panelist (Data & Equity) |
| Alexandra Aguirre-Rodriguez | Florida International Univ. (USA) | Marketing & Tourism (Transport Demand) | Session Co-chair (Education & Outreach session) |
| Jorge A. Prozzi | University of Texas at Austin (USA) | Pavement Engineering & Infrastructure Management | Session Chair (Infrastructure) |
| Carlos A. Rojas-Trejos | Universidad del Valle (Colombia) | Transit Systems & Urban Mobility | Session Co-chair (Public Transport) |

AI Usage Disclaimer:

AI tools assisted with wording, citation formatting, and synthesizing lessons from past multi-site events.