



Ex Ordo

Workbook

# The No-Panic Guide to Organising a Great Research Conference

*A workbook for busy people, from Ex Ordo.*



“

*There are certain experiences we should never digitise. Falling in love is one of them.*

*Discussing your work over coffee with a fellow researcher is another.*



**Paul Killoran**  
Ex Ordo Founder  
[www.exordo.com](http://www.exordo.com)

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# HOW A RESEARCH CONFERENCE (USUALLY) WORKS

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If we had a Euro for every time a researcher told us they'd underestimated the work involved in organising a conference, we'd retire early. But instead, we've written this workbook. Grab yourself a cup of tea, and let's get planning...

# INTRO.

**Our customers have busy jobs as researchers, they don't have days to spend on admin. But with planning, a proactive team and the right software, you can organise a great event – without the sleepless nights.**

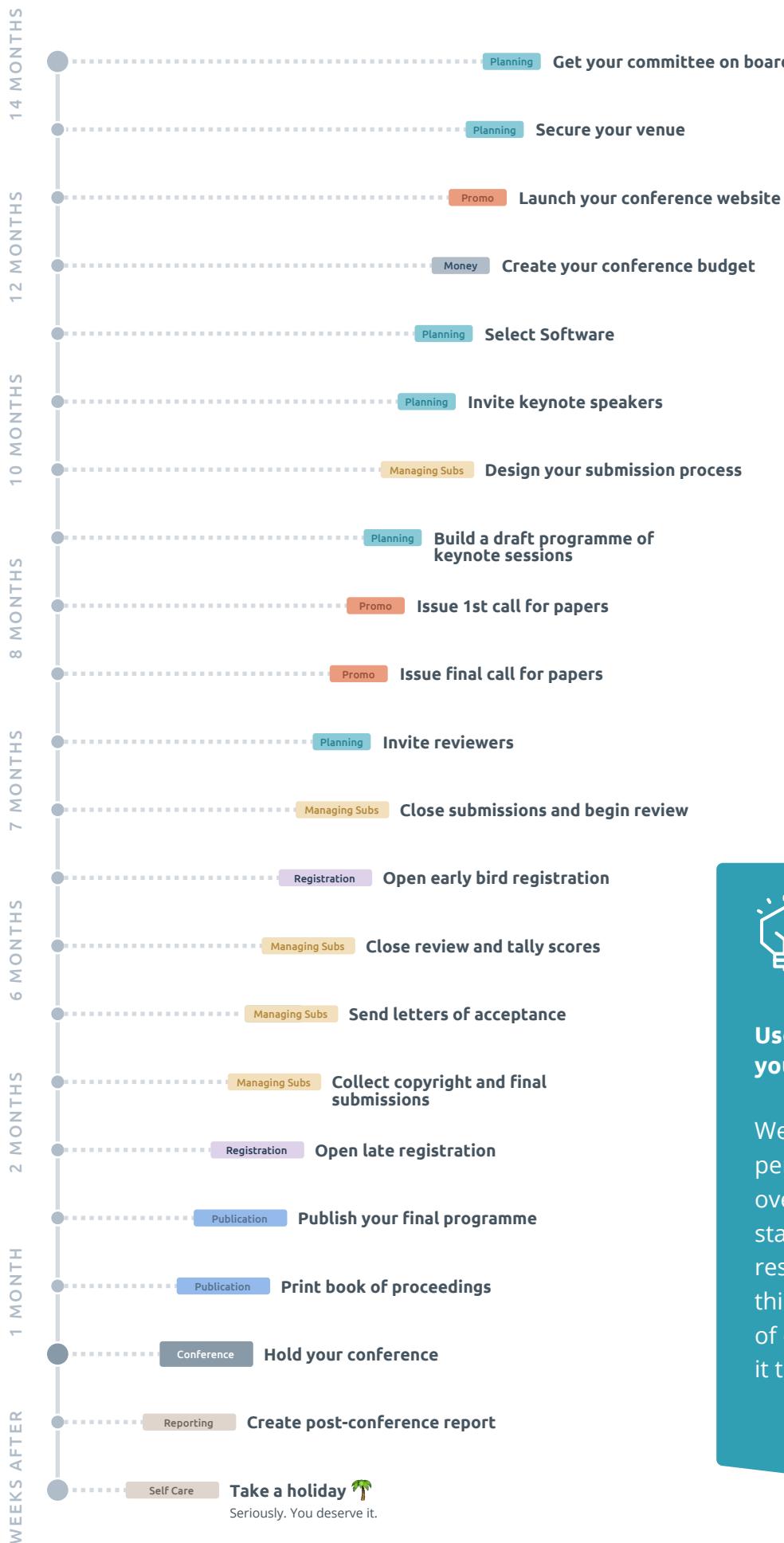
**B**efore we jump in, there are a ton of useful event-planning ebooks out there that'll talk you through tasks like choosing a venue and arranging catering. So we've skipped the event-planning side and focused on managing the "research" side of a research conference. This is for two reasons: it's a huge part of the planning process, and it's what we specialise in at Ex Ordo. Happy days.

## 5 Key elements to a successful conference

- 1 Plan.** It usually takes organisers 12-14 months to organise a conference, so start now. If the conference has taken place before, get feedback from the previous chair. Build a conference timeline (use the one on the next page to help), factor in enough time to complete each stage and leave some wiggle room around deadlines.
- 2 Delegate.** There's too much for one person to do. Share this workbook with your committee and get them involved as early as possible. And make sure you have one or two solid co-founders to help shoulder the load. Sometimes, you'll need to make tough decisions, when you do you'll need someone who's got your back.
- 3 Use software to save you time (and money).** Consider the real impact organising a conference will have on your day-to-day job and get a tool to help you manage it. Good conference software will cost money, but it's an investment in your time, your stress-levels and your reputation. And with software doing the heavy lifting, you can spend your precious time building a great programme instead of managing endless admin.
- 4 Pour energy into promoting it.** Researchers get sent a LOT of call for papers. In order to attract quality papers, you'll need to get creative when announcing your conference. Don't simply send a few call for papers emails and think the job's done. Put some creativity into promoting your conference and it'll pay off.
- 5 Get professional help.** Researchers are fantastic at doing research, not at planning conferences. If you're expecting more than 50 delegates, hire a professional conference organiser (PCO). If you don't have the luxury of hiring the full services of a PCO, consider hiring one just to manage logistics in the run up to your event.

## A TYPICAL CONFERENCE TIMELINE

## ORGANISING A GREAT RESEARCH CONFERENCE



**Use this timeline to build your own**

We've seen so many permutations of conferences over the years that we'd never state definitively: "this is how a research conference works." But this is the sort of timeline most of our customers work from, use it to help you plan yours.



# GETTING YOUR COMMITTEE ON BOARD

## 12-14 Months before your conference

Thinking about doing everything yourself? Stop right there. Every successful research conference needs an active organising committee. So form your committee around this time, and agree who does what.

01.

## Whether you're a large committee or a few dedicated folks, everyone needs clear responsibilities. So identify the major conference tasks and agree who's responsible for what.

**B**elow are the main responsibilities of a typical conference organising committee, split into roles. Although these are the most common roles we see, researchers often do things differently. And we find that organisations call these roles by different names. (We still get surprised.)

-  **General chair.** Your general chair is responsible for the overall running of your conference and makes final decisions, including how roles and responsibilities are divided. They're often responsible for selecting the location and for publicity.
-  **Programme chair.** Your programme chair ensures the conference has a well-balanced, high-quality technical programme. Together with the general chair, they'll develop your call for papers and be responsible for the review process.
-  **Track chairs.** If your programme is broad in scope, you may separate it into thematic areas or tracks. Each track can have its own chair, deadlines and reviewers.
-  **Other chairs.** You may want to appoint additional chairs with specific responsibilities. Such as local arrangements, your book of proceedings, or publicity.

The following people don't sit on your committee, but they're often part of a successful conference.

-  **Steering committee.** A steering committee is usually responsible for overall organisation, financial planning and advice. It may appoint your general chair and approve your programme chair.
-  **Professional conference organiser.** A professional conference organiser looks after event-planning admin and logistics. They may also take on tasks like managing submissions and your keynote speakers.
-  **Session chairs.** Session chairs manage the Q&A portion of each session and make sure presentations run on time.



### Diversity in your committee

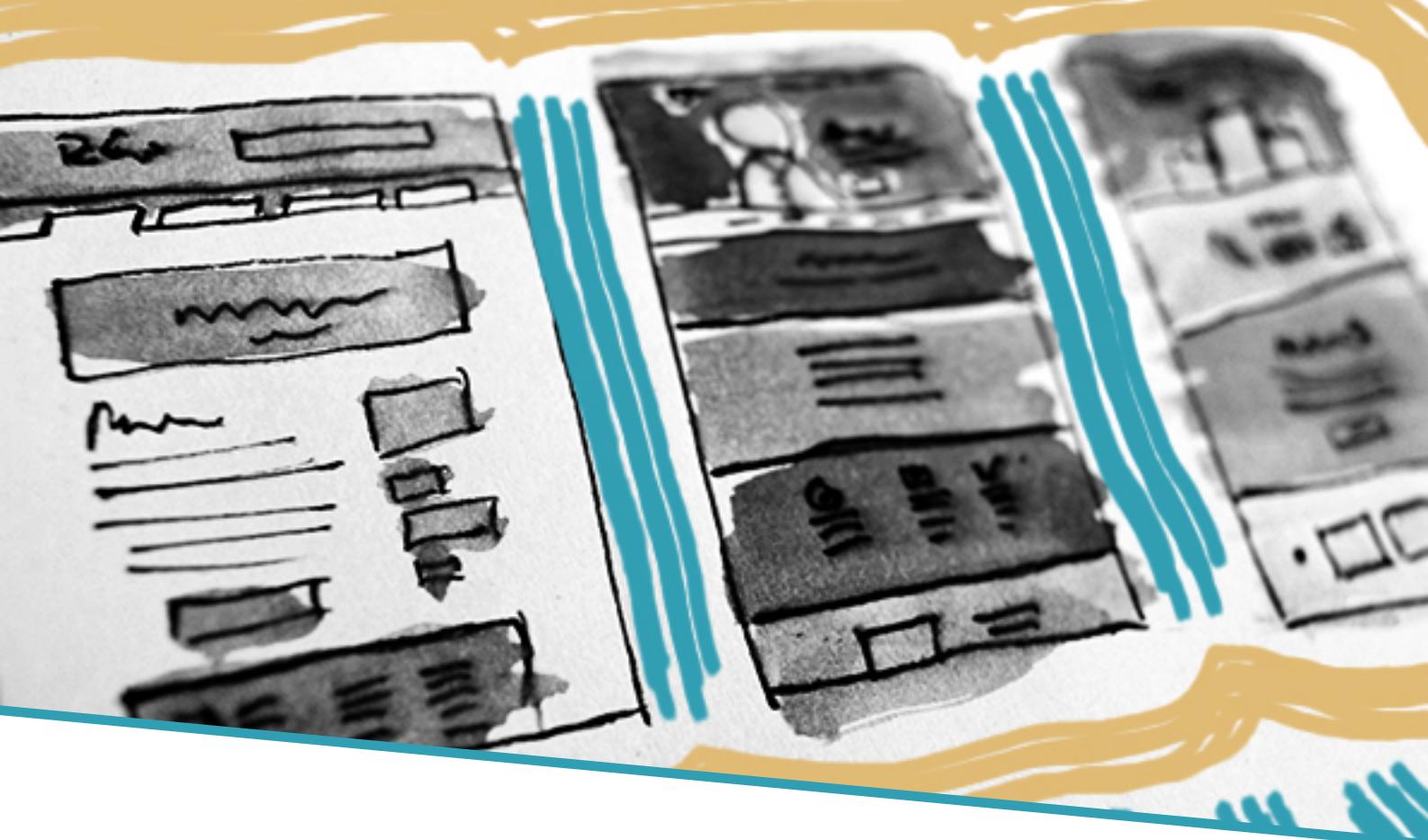
Make sure your committee reflects the diversity of your field with representation across: gender, career level, ethnicity and geographic location.



## Agree who does what

Whether you'll have lots of people responsible for a few things, or a few people responsible for lots of things, you need to make sure all the important stuff gets done. Use the panel below to help divide tasks fairly amongst your committee.

CONFERENCE AREAS	WHO'S RESPONSIBLE?
Creating conference website and promoting it	
Selecting venue and making local arrangements	
Sourcing conference software	
Announcing the conference and collecting submissions	
Registering your conference with the body governing continuing professional development	
Communicating with authors, reviewers and delegates	
Selecting and coordinating reviewers	
Inviting and managing keynote (aka plenary) speakers	
Registering delegates and collecting payments	
Building the conference programme	
Publishing the conference proceedings	
Financial accounting	



# CREATING YOUR CONFERENCE WEBSITE

## 12-14 Months before your conference

Whether it's a simple site or a bespoke design, you need a digital destination to send people to. Get it live as soon as possible so you can start sharing your event with the research world.

02.

**Your website will showcase your conference, answer visitors' questions and allow them to submit, register and get in touch. And it should get them as excited about your event as you are.**

**G**etting your website live as soon as you can will be a big boost to your conference. So make some key decisions now, get a bare-bones website up, and flesh it out as you go.

Your website should welcome visitors with strong visuals and the most important event details first. Think: what your conference is about, where it's located and when it's happening. Aim to put all this info "above the fold" on your homepage (i.e. the portion of the page that's visible without scrolling). And use the checklist on the next page to make sure you don't miss anything important.

### **Mobile responsiveness**

As of the middle of 2018, 51.89% of all global web traffic was from mobile devices; your website will be no exception. Make sure that when visitors browse it on a phone, everything looks and works properly.

### **Give people confidence in your event**

Whether you go for a DIY website option like Wordpress.org (free), a readymade website like Squarespace or Wix (€€), or build it from scratch (€€€), treat your website like a shop window. It should give visitors confidence in your conference.

### **Don't forget the extras**

If you're building a DIY website, don't forget that you'll also need to pay for things like website hosting (normally less than €10 a month), a domain name (around €15 a year) and any apps or plugins you need.



#### **Play the long game**

What happens to a domain like [www.ISCE2020.com](http://www.ISCE2020.com) when the organisers are planning ISCE2021?

When creating your domain, select a versatile name like [www.ISCE.com/2020](http://www.ISCE.com/2020) so future organising committees can reuse it every year.



## Planning the pages of your website

Use this checklist so you don't forget any important info.

- Homepage.** Conference name, date and location. Logo and image. Opening summary. Sponsors. Important deadlines and social media links.
- Welcome.** A welcome from your chair inviting submissions.
- Committee.** An introduction to your committee, including bios and photos.
- Conference topics.** Themes, topics, special sessions, panel submissions etc.
- Keynote speakers.** Their bios, pictures and links to their social profiles.
- Presenter guidelines.** Oral presentation timings, AV equipment available, instructions, and specifications for posters.
- Travel and accommodation.** Info on public transport and accommodation.
- Programme.** Release a draft programme when your keynotes are confirmed and flesh it out as you go.
- Registration.** Fees, payment methods and Ts & Cs, plus a link to your registration system.
- Visa information.** Any info international delegates will need, plus your visa invitation letter request process.
- Sponsors.** A showcase of your sponsors and sponsorship packages.
- Accessibility info.** Any info for delegates with accessibility requirements, plus contact info for when they have a need that's not addressed.
- Funding opportunities.** If you provide funding to help certain groups of researchers attend, set out the criteria here.

- Deadlines and dates.** This should include details on everything from when submissions close to when early-bird prices end.
- Call for papers.** Reproduce your call for papers in full.
- Guide for authors.** Guidelines on how to submit and a link to your abstract management system or submission form.
- Contact.** You may want to list different contact info for queries related to submission, sponsorship, registration, accessibility, etc. And include a link to sign up to your conference mailing list.
- Previous conferences.** Previous iterations of your conference



## BUILDING YOUR CONFERENCE BUDGET

### 10-12 Months before your conference

Even though the goal of a research conference usually isn't to make a profit, managing your finances is still vital. Create your draft budget now. Then adapt it as you secure funding and sponsorship.

03.

## **Creating a detailed budget is a vital part of the planning process, but there can be a fair bit of guesswork involved. So begin with a conservative budget, and scale as you go.**

If your conference has taken place previously, get as much feedback as you can from last year's chair. Develop as clear a picture of your income and expenditure as possible. But recognise that this will shift as your conference planning progresses. So create a conservative draft budget, and scale up as you secure funding.

### **Fixed costs vs variable costs**

Your expenditure should include a combination of fixed costs (around 35% of your total costs) and variable costs (around 50%). Fixed costs generally don't change: regardless of how many delegates attend, you'll need a venue and AV. Variable costs depend on numbers and cover things like catering and transport.

### **Tax exemptions**

If your conference is organised through a non-profit, you may qualify for a VAT/GST exemption on ticket sales, but be sure to check. And if you don't qualify, factor tax into your registration fees. Otherwise you could be left with a hefty bill from the taxman.

### **Budgeting for contingency**

No matter how well you plan, there will be unforeseen elements. And it's important your conference budget can handle them. Include around 15% of your total costs to cover the unexpected: like overtime for staff or currency fluctuations.

### **Funding pots**

The tourism budgets of many countries include funds for conferences with international delegates. When you're considering a location, check how the local tourist board can help. And check if associations or organisations within your field offer funding.



### **Use software to reduce costs**

Don't neglect software when you're listing your budgetary costs. Good conference software costs money, but it will eliminate hours of manual tasks and save you cash on big-budget items like printing.

<b>INCOME</b>	
Registration fees	
Social events	
Sponsorship	
Funding	
<b>TOTAL</b>	
<b>EXPENDITURE - FIXED</b>	
<b>ADMIN COSTS</b>	
Supplies	
Stationery	
Couriers and postage	
Bank account set-up and charges	
Pre-conference venue visits	
Professional organiser's fixed fee	
Speakers' travel and accommodation	
Speakers' gifts	
<b>TOTAL</b>	<b>TOTAL</b>
<b>MARKETING COSTS</b>	
Logo	
Programme	
Fliers	
Advertisements	
Signage	
Banners / Posters	
Photographer	
<b>TOTAL</b>	<b>TOTAL</b>
<b>SOCIAL EVENT COSTS</b>	
Room hire	
Entertainment	
Transport	
AV	
<b>TOTAL</b>	<b>TOTAL</b>
<b>MISC COSTS</b>	
Transport	
Contingency	
<b>TOTAL</b>	
<b>SOFTWARE AND PUBLICATION COSTS</b>	
Website design	
Website hosting	
Website domain name	
Conference management software	
Book of proceedings	
Mobile conference app	
<b>AV COSTS</b>	
Projectors and screens	
PA & microphones	
Lighting	
Wifi	
Laptops	
AV technicians	
Poster boards	
<b>VENUE COSTS</b>	
Venue hire	
Furniture rental	
Staffing	

EXPENDITURE - VARIABLE	
Welcome reception	
Coffee breaks	
Lunch	
Delegate packs	
Name badges	
Lanyards	
Professional event organiser's per-delegate fee	
Registration system fee on reg payments	
Social event catering	
Book of proceedings	
<b>TOTAL</b>	

## Choose a strategy for pricing your conference

There's no hard rule for pricing your fees, but here are a few ways to calculate what to charge. Keep in mind that you'll likely have different fees for different delegates types, like early-career researchers.

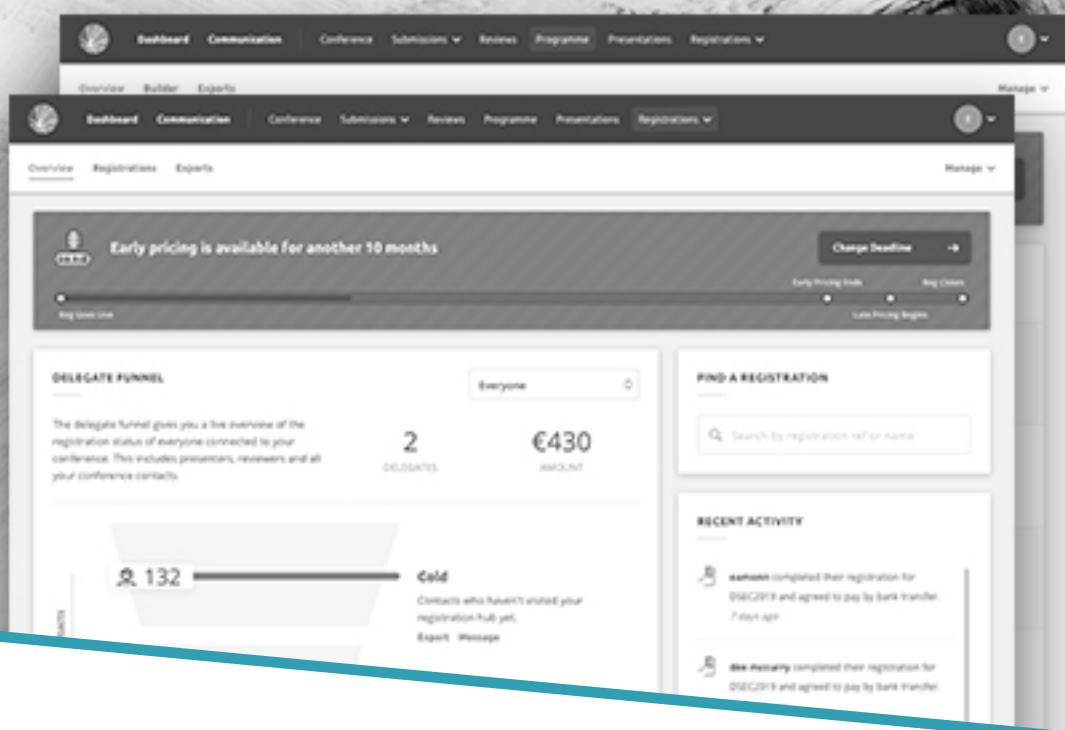
- 1** Calculate your costs and divide the sum by the lowest projected number of delegates. This'll give you a good idea of how you should be pricing your conference fees.
- 2** Calculate your conference costs and decide on an "ideal" price to charge delegates. This will give you the number of delegates you'll need to attract at this price.
- 3** Price your fees first, then work backwards to build your conference within that budget.



### Free budget template

For something a little meatier, we've got this as a handy Spreadsheet template at

[www.exordo.com/budget-template](http://www.exordo.com/budget-template)



# USING SOFTWARE FOR EFFICIENCY

## 10-12 Months before your conference

Sourcing the right software is as important as setting a date. Now's a good time to do your homework, compare software packages and make your decision.

## The right software can eliminate a lot of late nights, uninspiring work, and admin stress. Which means you can focus on your #1 priority: organising a great conference.

We know a lady who used to print a thousand submissions and sort them into topic piles on her office floor. Then she'd walk around with post-its, trying to pair submissions with reviewers. She doesn't do that anymore because she uses conference management software. (Ours.)

Conference software is essentially abstract management, registration, and scheduling software rolled into one system. If you're expecting to receive more than 50 submissions, we heartily advise you invest in a decent software package to help you manage them. It doesn't need to be ours, but it does need to be designed for the complexities of research and academic events.

### Can't I buy software separately?

You can. And sourcing stand-alone software for managing abstracts, registering delegates and so on may save you money. But trying to manage lots of systems that don't talk to each other eats into your time. It's also where mistakes happen, as you'll have a million other things vying for your attention in the run-up to your event.

Managing your conference using one piece of software means that everything's centralised so you can share the workload with your committee. And you can do things like see which presenters haven't registered yet, and make abstracts and papers available for download from your programme. Handy stuff.



### A helping hand

Not everything will happen inside your conference software. Software like **Slack** for project messaging, **Skype** for group video calls, **Asana** for project management, **Trello** for task management and **MailChimp** for mass emailing will help your committee share resources and collaborate, regardless of where everyone's located. And best of all? They're free.



## What to look for in conference management software

Lots of generic event software boasts some conference features, but these can be flimsy at best. When you're comparing packages, check that the software can handle your needs. Good software should have the following features.

- Abstract management.** Authors submit online, the system ensures submissions meet mandatory checks (like word limits) and sorts them by topic and presentation type. Then it helps you allocate submissions to the best reviewers, saving you hours of work.
- Delegate registration.** A good registration system will help you create a merchant account for a short period of time and get paid fast. (A *really good* system will also help you avoid the hefty markups that come as standard with lots of online payment providers.)
- Programme building.** With hundreds of authors, topics and timing conflicts, building your programme can feel like assembling a puzzle. A good builder will help you create parallel sessions, check for conflicts, and share it on mobile so you don't have to print a thing.
- Tech support.** Overlooking tech support is the sort of mistake rookie organisers make once. (And only once.) Sometimes, things go wrong. When they do, it's good to know there'll be a person – not a chatbot – on hand to untangle you.
- Mobile conference app.** An app makes navigating a large area and a complex technical programme easy. It will also allow delegates to send private messages and public posts. And if a session moves, you can send a notification to every delegate's phone.
- GDPR compliance.** You'll be handling the personal info of authors and delegates. If any of these folks are EU citizens, by law your software needs to be GDPR compliant.
- Software updates.** Good software is constantly improving, and frequent software updates are a good indication that software is worth the spend.

- Live demo.** To compare software, you need more than just screenshots. Any reputable software company will be happy to give you a live demo of their software.
- Book of proceedings.** Software can eliminate the cost of designing, formatting and printing your book of proceedings. Instead, collect camera-ready (corrected) submissions as part of your submission process, build the book via your software, and publish it online. Bingo.



## COLLECTING AND REVIEWING SUBMISSIONS

### 9 Months before your conference

Before you can think about sending your call for papers (which we'll cover in chapter 6), you need to define your submission and review dates, develop your submissions process and set up your abstract management system.

05.

## When it comes to managing submissions, the devil's in the details. So iron out your process and use software to eliminate as many manual tasks as you can before you open submissions.

**A** thorough peer review process will ensure the suitability, quality and originality of your technical programme. Here's what's usually involved.

- **9 Months before.** Define key dates and create your submission process. If you need multiple rounds of review, budget extra time for this.
- **8-9 Months before.** Send your call for papers and begin collecting submissions from authors.
- **8 Months before.** Build your panel of reviewers. Some will go AWOL, so invite plenty.
- **7 Months before.** Finalise your marking scheme and close submissions.
- **7 Months before.** Match submissions to reviewers, and send each reviewer their list. Reviewers generally have four weeks to review. (Though this usually runs over by a week or two.)
- **6 Months before.** Collect reviews, compare scores and comments, and send letters of acceptance. If you need two rounds of review, request additional material or corrections from authors, then rinse and repeat your review stages.
- **2 Months before.** Create your book of proceedings.



### Plan backwards

For example, if you're publishing a proceedings book, start from its publication date. To meet this deadline, when must final submissions be ready? So when should you send acceptance letters to authors? So when must review be finished? And so on. This is also helpful for flagging other factors, like that you'll need book-friendly formatting guidelines for authors.



## Design your submissions process

Use these questions to kickstart the design of your submissions process.

QUESTIONS	ANSWERS
<b>When is your submission deadline?</b> <i>You'll probably need to extend this by a week or two, so factor this into your timeline.</i>	
<b>What type of submissions do you need?</b> <i>These could be abstracts, extended abstracts or papers.</i>	
<b>Do you need authors to follow a format?</b> <i>For example, will you have a max. word count or formatting conventions? Include these in your guide for authors.</i>	
<b>How will you collect submissions?</b> <i>We recommend you use abstract management software, but if you're only expecting a few, a simple form might do the job.</i>	
<b>What extra info do you need from authors?</b> <i>This could include things like: file uploads, anti-plagiarism statements and copyright transfers.</i>	
<b>What is your review deadline?</b> <i>Reviewers often run over, so factor in some wiggle room.</i>	
<b>How many reviewers do you need?</b> <i>See the panel on the next page.</i>	
<b>How will you match submissions to reviewers?</b> <i>Most of the conferences we work with agree a list of submission topics. Reviewers then select the topics they're best equipped to review for.</i>	
<b>Will you allow nepotism?</b> <i>Nepotism happens when an author and a reviewer share an affiliation (e.g. work at the same organisation)</i>	
<b>Single or double-blind review?</b> <i>Single-blind means the reviewer knows who the author is, double-blind means they don't. (In both cases, the author doesn't know who the reviewer is.)</i>	

QUESTIONS	ANSWERS
<b>How will reviewers score submissions?</b> <i>Reviewers on Ex Ordo conferences generally score on criteria like: technical merit, readability, relevance, originality and format.</i>	
<b>Will you share reviewer comments?</b> <i>If not, make sure you're able to easily hide them.</i>	
<b>What happens after you accept a submission?</b> <i>For example, will you need to collect source files, or corrected copies for your book of proceedings?</i>	



## Don't overload reviewers

We once worked with an organiser who tried to allocate 120 submissions to each reviewer. Don't be that organiser. Consider how much time is fair to ask of your reviewers and how long it's likely to take them to review one submission. Use this to work out how many submissions you should allocate to each.

Compare this number to how many reviews each submission needs (two is usually the minimum, but three means you'll have a swing vote if two reviewers disagree) and how many submissions you expect to receive. This will allow you to work out how many reviewers you to invite. Then add around 15% extra to account for reviewer drop-off.



## What to look for in an abstract management system

Managing submissions manually can seem like a good idea from a distance. Then before you know it, you're up till 1am pinging irate emails to authors who've ignored your formatting guidelines. Do yourself a favour and source conference software that includes sturdy abstract management capabilities. It should tick these boxes.

- Has a customisable submission process.** The system needs to be able to flex to match the process you've designed or it won't be much help.
- Allow authors to make their own corrections.** If it doesn't, you'll have to step in every time they need to make a change.
- Let's you track reviewers' progress.** So you can send reminders to ones who haven't started (and leave the ones who have in peace).
- Has a conference software integration.** If it's a standalone system, you'll need to copy info to and from your registration and programme software .



## ISSUING YOUR CALL FOR PAPERS

### 8-9 Months before your conference

Time to announce your conference to the world. There's just one problem: all 200,000 other research conferences are trying to do the same thing...

06.

## **Great, your conference is gonna be awesome, so you better tell the research world. Use this chapter to help add some creativity to how you get the word out.**

**A**t election time in Ireland, political hopefuls begin a race called “Who can put up more posters?” It can reach the point where every lamppost on your route to work contains a face beaming down at you. Almost everyone gets annoyed by these posters, yet politicians feel they need to outpace each other.

It can be helpful to think about your conference call for papers along the same lines. Researchers get sent a LOT of call for papers, and most organisers send theirs four or five times, which adds to the noise. Instead of trying to be the politician who puts up the most posters, ensure the few calls you send are clear, compelling and reach beyond people’s inboxes.

### **Traditional email**

Whether you’re sending your call for papers through conference software or a mass-emailing tool like MailChimp, make sure it contains all the vital details, like why your conference matters and how people can submit.

### **Use your personal connections**

Call your colleagues, friends and connections in your field to ask them to submit and to spread the word. Don’t underestimate the power of personal connections. Most organisers don’t call people to announce their conference. So be the exception.

### **Reach out to conferences in your field**

If you’re attending any related conferences between now and your submission deadline, ask if you can get up and deliver a five-minute presentation about your conference.



#### **Don't get fined**

The EU’s new data protection law, the GDPR, applies to anyone who controls the personal data of EU citizens. If you send your call to researchers who haven’t consented to receive it, your conference could be fined. So ask for consent from everyone on your mailing list. And include an unsubscribe link in every email. It’s not just good practice, it’s the law.

## Use this call for papers template to write your own

**Subject line:** Submit to <Conference name>

<Conference name>

<Conference dates>

<Conference website>

It's a pleasure to invite you to <Conference name>. The conference is organised by <department & organisation> and will take place in <location> on <dates>.

<Brief history of your organisation/conference and why authors should submit. If it's partnered with a journal, or sponsored by an affiliate, include the details.>

The theme of <Conference name> will be <Conference theme>.

<Topics of interest>

The deadline to submit is <Submission deadline>.

To submit your research, click here: <Link to your abstract management system>.

Guide for authors <Insert any relevant information, guidelines and links>

### Important Dates

Deadline for submission: < Deadline>

Notice of acceptance: <Date>

Deadline for camera-ready (corrected) submissions: < Deadline>

<Rough programme outline or confirmed keynote speakers.>

<Names and roles of the organising committee>

For enquiries, contact: <email address>

I look forward to seeing you at <Conference name>

Sincerely

<Chair>

<Unsubscribe link>



## Boost your call for papers impact

Beat the inbox bloat by getting creative about how you announce your event.

QUESTIONS	ANSWERS
<b>What conference directories are you planning to list it in?</b> Conference directories like PaperCrowd are a great way to get your conference in front of more people. And they're free.	
<b>Are there similar conferences who might promote yours?</b> If a conference with similar topics to yours exists (and you're not competing for delegates) ask if they'll share your fliers in their delegate packs and if you can give a short address at their event.	
<b>Are there any university departments or organisations willing to share it with their members?</b> Call up colleagues and ask them to help spread the word.	
<b>Are there any research publications who might publish a media release about it?</b> To do this, you'll need to make your announcement newsworthy, keep it concise and include a quote from the chair.	
<b>Are there any relevant listservs you can post it to?</b> Listservs are moderated mailing lists that some academics and researchers use.	
<b>Which social media accounts are you planning to set up? And who will manage them?</b> Social media can be a good way to reach interested researchers.	
<b>Does your conference have any technical sponsors who might help promote it?</b> They want people there as much as you do. Ask them to encourage business partners to attend, send your announcement to their contacts list, and promote on social media.	



Albert Einstein

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CONFERENCE

Joint Deep Space Exploration Conference 2019

REF

716609

START DATE

21 Aug 2019

END DATE

23 Aug 2019

## REGISTERING DELEGATES

### ● 7 Months before your conference

The registration portion of any event is often a magnet for things going astray. So do some prep, test (and then re-test) your system, and open registration now – at least a month before you send acceptance letters.

## Registering delegates for a conference means all the usual ticketing tasks, plus some added complications. So aim for simplicity and get organised early.

**T**hink back to when you last bought a ticket for a big concert or festival. Did you pay for it by card? What about the last conference you attended? Managing registration means looking after the usual event tasks like selling tickets and collecting payments and delegate info. But with two big differences.

One, there's a decent chance that lots of your fees will be paid through funding, grants and bursaries, rather than by the delegates themselves. This funding can take delegates a bit of time to arrange (and it's a payment option you'll need to account for in your registration software).

And two, because most of your delegates are also presenters, you're in a race to register them so you can finalise your programme and your book of proceedings.

### A simple registration process

So to encourage people to register as early as they can, aim to have a quick and painless registration process set up and ready to go well before you send your letters of acceptance. Recognise that while collecting delegate info via your registration form is important, every question you ask is another hurdle. The more questions, the more time it will take to register, which means more opportunities for people to run out of steam or for things to go awry.

Once you've designed your registration form, test it, and then test it again. This will help you see how straightforward it is, but it's also a good way make sure no problems arise when delegates start registering for real.



### Boost accessibility

While inequity at research conferences may not be deliberate, addressing it has to be. Boost your event's accessibility by offering lower fees and bursaries to delegates from under-represented groups. And consider offering subsidised childcare and allowing early-career researchers to volunteer in lieu of paying fees.

## 5 Ways to boost registrations

Give people payment options and a few clever nudges so you're not twiddling your thumbs, waiting for payments to start trickling in.

-  **Build a limited-access pricing model.** Rather than selling all-in registrations, sell separate tickets for events. For example, offer delegates a basic fee that admits them to every session, and add optional charges for events like workshops, social outings and meals. This gives delegates more freedom to design around their needs.
-  **Give delegates incentives to register early.** Use early-bird and late prices to encourage registrations within a certain time period. This way, you won't be scrambling to raise money close to conference day and you'll be ready to cover the cost if your caterer raises their prices on last-minute orders.
-  **Ask authors to RSVP.** When you send letters of acceptance, ask the authors of accepted submissions to RSVP before they register. This can give you a good idea of numbers before official registrations start rolling in. Then if you have a list of second-round submissions you can decide whether to accept or reject them, based on your RSVP numbers.
-  **Carefully time when early-bird prices expire.** It might take people a bit of time to arrange the funds to register for your conference, so give accepted authors plenty of time to register before your early bird prices expire.
-  **Give them payment options.** A good chunk of your fees will ultimately come from funding, bursaries and grants, not from delegates' own pockets. But if you force people to pay by card they'll need to wait to claim it back. This can put a stress on their finances. So give them the option to pay by invoice as well as card.



### Publicise grants and bursaries

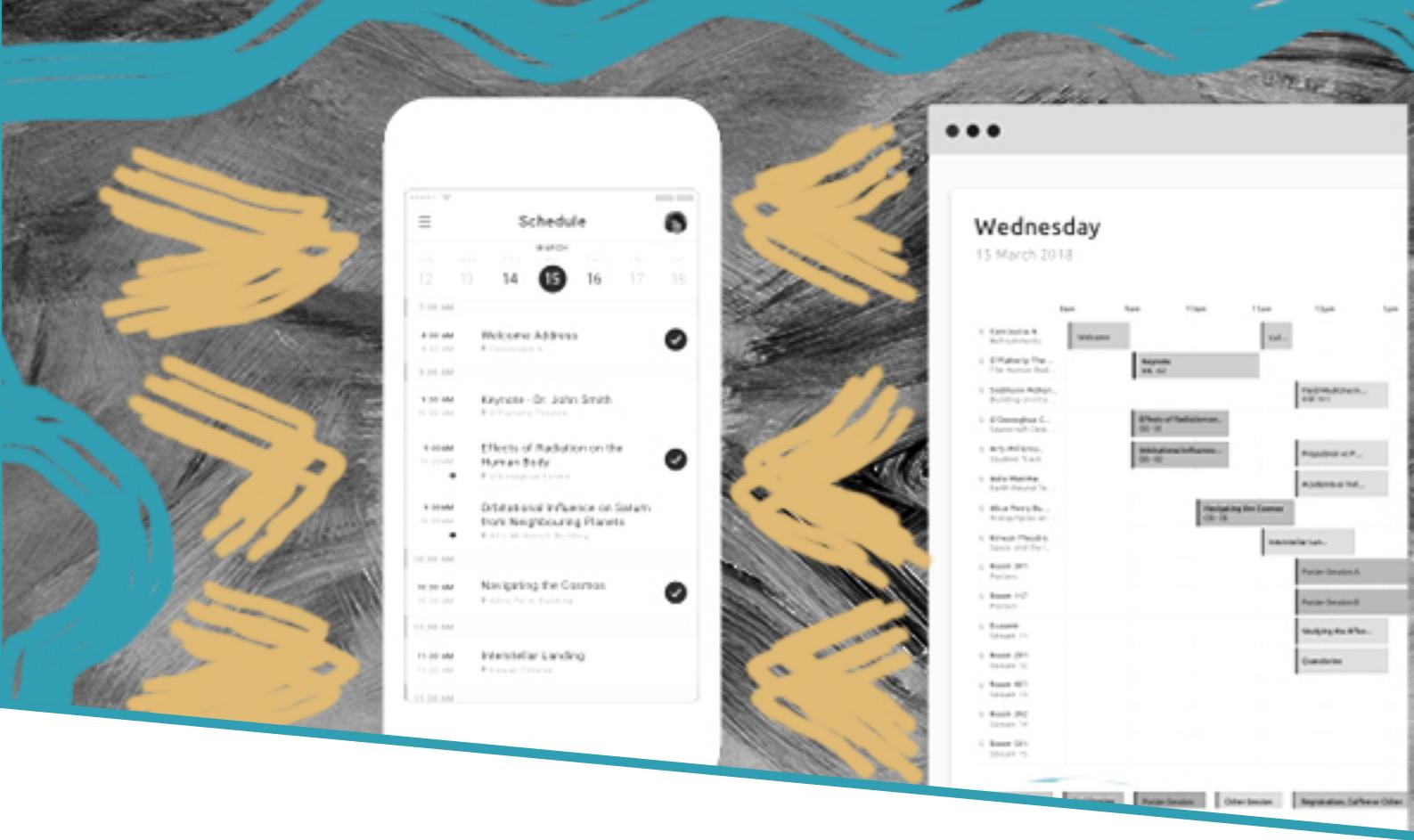
Many early-career researchers can't afford to attend conferences without a travel grant. If your conference offers any, create crystal clear criteria (e.g. by "early-career researcher" do you mean PhD students? Or everyone who isn't permanent?) and make them easy to find on your website. And include links to any other grants you know about. Making info like this accessible can save would-be delegates hours of funding research.



## What to look for in registration software

When you're shopping for a registration system, check it allows you to:

- Sell items separately and at different prices.** Once size won't fit all. You'll likely want to create separate registration fees for students, members etc, charge early-bird and late prices and add ticketed social events and workshops.
- Offer discounts or free tickets.** You may want to reward reviewers or volunteers, or create free tickets for keynote speakers.
- Find out accessibility requirements (like dietary restrictions).** Asking delegates for accessibility info when they're registering will save you from surprises later on.
- Take payment by card or invoice.** A lot of generic ticketing systems don't allow this, but it's an important option to offer researchers who are using funding to cover their fees.
- Integrate with conference software.** This will save you having to copy info to and from your abstract management and programme system.



# BUILDING YOUR PROGRAMME

## 2 Months before your conference

Now's a good time to build and release your final programme. But keep in mind that you'll likely be making changes to it right up to the wire.

## Shape your programme so it facilitates connections between attendees, embraces variety and leaves people with some room to breathe.

The serendipitous connections delegates make with each other are one of the biggest benefits of attending your event. So, while the quality of your speakers and presentations are undeniably important, how well you facilitate conversations between people will play a major part in your conference's success – or failure. We've included some tips on the next page to help you weave opportunities for connection into the fabric of your event.

### Embrace variety

Even researchers aren't immune to the post-lunch slump. Workshops and breakout sessions can be a great way to engage delegates after a few hours of sitting and listening to presentations. And if you're planning high-energy activities, schedule them for the conference deadzone after lunch.

### Don't underestimate the power of breaks

People don't run on empty. Add plenty of tea and coffee breaks where they can rest, refuel and chat to other attendees. And if you can, schedule breaks after sessions (instead of after keynote speeches). This way, when a difficult question or a debate arises in a Q&A, people have the perfect opportunity to discuss it over coffee.

### The great reshuffle

And finally, so your programme doesn't end up with more holes than Swiss cheese, check which presenters have registered in the run up to the big day. Chase up the ones who haven't, and then reshuffle your sessions as needs be. And on the day itself, ask someone at the registration desk to monitor no-shows, then do one final reshuffle.



### Leave printing in the past

The conference tradition of printed programmes with scribbled updates is falling out of fashion. Whether you plan for it or not, delegates will use their phones to navigate your event. Give them a helping hand by investing in a mobile conference app or an online programme that's navigable from a smartphone.



## Create opportunities for connection

Networking can be uninspiring at best (and stomach-churning at worst). So opportunities for connection at your event need to go beyond a few slots where people awkwardly shuffle around the wine and cheese. Try these instead.

- Hold a pre-conference event for first timers.** That way they can meet people in a less formal setting, and they'll be starting conference day one with friendly faces they can link up with throughout the main event. You could even include a presentation skills workshop to help ease any pre-conference nerves.
- Treat your badges as networking tools.** The one thing most conferences have in common? Crappy name badges. Buck the trend by choosing designs with big, bold type for first names, no awkward positioning over people's' chests and holders that don't flip. And to help start conversations, ask delegates to send you three research interests then print them on their badge.
- Dot themed events throughout your programme.** Create informal breakout sessions for specific groups like department heads or postdocs. These give attendees the chance to share common interests and struggles, and meet potential collaborators.
- Start conversations before the big day.** Spend a bit of time thinking about delegates' needs, and create pre-conference posts in your app (or on Twitter) to kickstart conversations. These could be about anything from asking people to post the biggest research obstacle they're facing, to asking if those living near the venue are willing to host student attendees in their homes.
- Implement a buddy system.** For some people, networking isn't just an uncomfortable concept, it's downright scary. Use a conference buddy system to pair first-time delegates with people who know the ropes. Give buddies two simple tasks: contact their newbie before the conference to say hello; and offer to meet them the morning of the conference to show them around.



## What to look for in a mobile conference app

A mobile app allows delegates to access your programme on the move and means you can send notifications to delegates' phones when there's last-minute change of plan. When you're looking for an app, make sure it's designed to work with the complexities of your conference. To be truly useful, a conference app needs to:

- Support parallel sessions and sessions containing multiple presentations.** Most generic event apps aren't designed to do this, so check before you buy.
- Let delegates download presentation material.** So you don't need to print a thing.
- Allow you to share your book of proceedings.** This will save you money on printing, and mean delegates won't have to haul a heavy book around.
- Give sponsors valuable space.** An app should allow you to create in-app ad banners and promoted posts for your sponsors.
- Integrate with your conference management system.** Otherwise you'll need to copy and paste your whole programme and edit it each time there's an update.



## Paper or digital?

A small question that'll have a big impact on your budget and your carbon footprint. Our advice is to invest in good wifi, and to print as few materials as you can. If your budget is tight, stick with an online programme that can be viewed on smartphones. But if you can stretch to it, give delegates a mobile conference app. And if you must print, print only the most critical info, like a simple timetable rather than a programme book. Or consider giving delegates lanyards with at-a-glance timetables.(If the wifi goes down and you don't have an app, these will come in handy.



# HOLDING YOUR CONFERENCE

## From 8 weeks up to conference day

Time for one final push. Now's a good time to get all hands on deck. And remember: you are a swan gliding gracefully across the surface of a lake. (No one needs to know your legs are paddling like hell below.)

09.

## Even though the bulk of work is done and dusted, there's still lots to do. But don't panic. Divide this list of tasks amongst your committee. Then go forth and conquer.

In the last few weeks before your event, go through this list and divide these tasks between your organising committee and volunteers. If you're holding your conference without the help of an event professional, you'll need to add regular event tasks (like arranging transport and buying gifts for keynote speakers) to this list.



### 8-2 Weeks to go

- Select and recruit session chairs.** Session chairs make sure sessions run on time and encourage questions after presentations. Send your invites now.
- Collect presentations and camera-ready submissions.** Camera-ready means final drafts that are ready for publication. If you're collecting presentations before the conference, do this now via your abstract management system. (Or if you're planning to collect them at the conference, organise a drop-off desk.)
- Compile your book of proceedings.** This is the official record of your conference. You may want to publish your book at the conference or wait till after. If you're publishing it with a publishing house they'll give you a hard deadline for when to send them papers and copyright disclaimers. Allow two weeks of buffer between this deadline and the one you give authors. We've seen organisers get stung when authors invariably miss the deadline and there's no buffer time.



## 8-2 Weeks to go

- Configure your conference app.** If you're using a mobile app, set it up so delegates can use it to network and create a personalised itinerary.
- Send programme info to delegates.** Send delegates your finalised programme as well as info on how to download your conference app (if you have one).
- Order materials.** Order materials like onsite signage, contents of delegate packs like: pads and pens, conference bags, badges and lanyards, certificates of attendance and printed programme (if not online).
- Print posters.** If your posters are hard copy, print them now.



## 1 Week to go

- Organise registration desk.** Confirm registration desk and information point setup. Organise facilities for accepting payment if needed, like receipt books and online card payment facilities. Arrange to bring printers and laptops so you can reproduce badges if needed.
- Arrange delivery of book and posters.** If you've got a hard copy book of proceedings and poster presentations, have them delivered to the venue.



### 3 Days to go

- Deliver materials.** Organise storage for conference materials and send them to the venue.
- Check equipment and audio-visual arrangements.** Check conference computers, projectors and any other equipment like boards for poster presentations.
- Transfer presentation material.** Download presentation files and transfer to conference laptops. Ensure that all presentations are working.
- Send welcome email.** Send delegates parking info and permits, airport transfer details, the venue wifi code and an invite to your welcome reception.



### 1 Day to go

- Print delegate list.** Hand over delegate list to registration staff.
- Mount posters.** Mount posters on display boards.
- Mount signs.** Mount conference signs and directions around the venue.
- Update programme.** Update online programme with late withdrawals.



### The morning of the conference

- Set up registration.** Arrange the registration desk: name badges, delegate packs, cheque and card payment facility, delegate lists, etc.
- Hold pre-conference meeting.** Brief your volunteers and session chairs on emergency procedure announcements and instructions on running sessions.
- Organise an AV rehearsal.** Check equipment and ask session chairs to familiarise themselves with it and ensure presentations are ready to go.



### During the conference

- Welcome delegates.** Welcome delegates, hand out badges and delegate packs.
- Complete registration.** Complete outstanding payments and close your registration system.
- Steward the venue.** Have volunteers on hand to direct delegates around.
- Hold a steering committee meeting.** Did the event meet its objectives? Were there any issues? Discuss next year's conference and choose a chair.



### At the end of the conference

- Distribute evaluations.** Hand out evaluations or save some trees and circulate them via your mobile app.
- Collect badges.** Ask delegates to hand in holders and lanyards for recycling.
- Collect materials.** Collect posters, arrange for items to be couriered or disposed of.



# COMPIILING YOUR POST-CONFERENCE REPORT

## After the conference

Take a moment to savour that post-conference feeling. It's nice, isn't it?  
Now it's all over, save for the post-game analysis...

**No matter how well your conference went, there are always lessons learnt. Now's your chance to document them in your post-conference report.**

**Y**our report is an important part of improving your conference for next year. And you may be required to submit it to any funding bodies or to your institute or organisation. Use the checklist below to help you compile yours.



### **After the conference**

- Send thank yous.** Email to delegates, staff, volunteers and keynote speakers.
- Collect and review payments.** Collect outstanding payments. Review invoices for accuracy and arrange payment. Update your budget.
- Review evaluations.** Review the delegate survey and any other evaluations.
- Compile tech reports.** Review the end-of-conference report from your conference software.
- Send sponsors' summary.** Send sponsors any stats you have on their return on investment of sponsoring your event.
- Create your post-conference report.** Compile your post-conference report from your financial information, evaluation results, tech reports, sponsors summary and meeting notes. Prepare a full report for your funding sources and internal use and include recommendations for the incoming chair.
- And finally...take a holiday.** We've seen chairs try to jump straight back into work after organising a conference, and it ain't pretty. So give yourself a break before you go back to business as usual. 



# THE PEOPLE BEHIND THE BOOK

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Somewhere along the way, conference software got left in the dust. Researchers today – the world's smartest people – are still using software that's outdated and confusing. We've poured our energy into changing this.

We're a team of professionals in the west of Ireland working hard to give you everything you need to run a research conference. We obsess over researchers' experiences, we don't believe in taking the easy route, and we drink a lot of tea.

Come and say hello.



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