A Guide for Konferenco Steering Committee

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Original document: A Guide for HotNets General Chairs

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Congratulations on steering a Monero Konferenco! Hosting can be a really rewarding experience. This document is intended to help make the process as easy for you as possible.

*I make no guarantees that any of the information in this document is up-to-date. If you notice that any of the information is out of date, please update this document, and consider this a living thing.*

# What does the Konferenco Steering Committee do?

These individuals steer the Konferenco. Their responsibilities include, but are not limited to:

* Approving of budget submitted by the Konferenco Organizer (you).
* Receiving regular updates to make sure everything is coming together.
* Helping clear roadblocks and act as contact point for decision making.
* Knowing what has and hasn’t worked in the past
* Identifying tiered sponsorship structures and sponsor benefits.
* Working with Konferenco Organizer (you) with the sponsorship income part of the budget.
* Finding and negotiating sponsorship deals.
* Ensuring sufficient sponsorships are made to meet the budget.
* Final decision authority rests with the SC.

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# KNOW WITH WHOM YOU ARE WORKING

As the steering committee, you make most of the biggest decisions of how money is spent.

One of you is likely to be the individual (or individuals, or a representative of the entity) upon whom tax liability for this event ultimately falls.

Your right-hand-person is the Konferenco Organizer and their program manager, who work together to act as a bridge between you, the content committee, and all other groups that make a Konferenco run, like the venue/rental/catering/hotel representatives, A/V, web developers, and of course speakers, sponsors, panelists, moderators, and other Konferenco personnel.

Here’s what some of these are broadly responsible for.

* **Konferenco Organizer (KO):** The Konferenco Organizer may be the program manager and not know it. The KO is responsible for, among other things, the following:
  + Budget design and reporting
  + Venue
  + Audio/visual (A/V) recording or streaming
  + Catering
  + Online registration
  + Website
  + Assisting the SC with handling sponsorships
  + Travel and accommodations for speakers
  + Welcome bag sourcing, order, and assembly
  + More.
  + More than that.
  + No, even more.
  + All the little things that make a Konferenco work but are easy to take for granted (badges, posters, power, wifi, …).
  + Speaker dinner
  + Handling money: getting money in, getting invoices out.
* **Program manager (PM):** The Konferenco Organizer may be the program manager and not know it. The Konferenco Organizer will probably seek approval from the SC to hire an independent program manager. We recommend event organizers with experience in organizing academic conferences or organizing engineering, medicine, science, or technology conferences outside of academia. The program manager is responsible for, among other things:
  + Obtaining cost estimates from vendors and venues.
  + Reviewing and negotiating contracts, insurance policies, etc.
  + Day-to-day operations
  + Handling travel and accommodations for speakers, panelists, etc.
  + Assisting the KO with welcome bag assembly and event day registration
  + Assists the Konferenco Organizer with everything Konferenco-related, ranging from spreadsheets to budgets to ordering, handling, and assembling welcome bags.
* **Content committee (CC).** These individuals select the content for the Konferenco, invite speakers, act as masters of ceremony of the event, and coordinate publications of proceedings of the Konferenco.
  + Nominate, invite, and confirm invited speakers (collecting abstracts), panelists, and panel moderators.
  + Define submission requirements for online proposals
  + Collect and judge submissions for inclusion
  + Set the schedule of sessions and panels.
  + Sending up-to-date speaker, panelist, and sponsor information to you for posting on the website.
  + Act as masters of ceremony (introductory remarks, introducing speakers, introducing panels, possibly acting as panel moderators).
  + If proceedings are to be published, coordinate the collection of printer-ready papers, permission forms, and write frontmatter of proceedings.
* **Contacts for sponsorships, media partnerships, and non-profit supporters.** Members of the steering committee find sponsors, media partners, and non-profit supporters, negotiate the terms of these sponsorship/partnership contracts and supporter memoranda-of-understanding. Once terms are negotiated, members of the SC provide contact details to the KO.
* **Venue/catering/hotel/restuarant representatives.** These individuals are our contact points.
  + Venue needs a “run-of-show” (minute-by-minute schedule of event day).
  + Rental representatives provide chairs, tables, electronic equipment, etc, that is not provided packaged with the venue.
  + Catering needs menu choices, number of attendees.
  + If catering is paid by-consumption, wants to receive instructions throughout event.
* **Audio/Visual.** These individuals run all A/V.
  + Recording all talks and panels.
  + Streaming talks and panels to the web, if applicable.
  + Renting and operating A/V equipment, if applicable.
  + Accurately estimating the inventory and configuration of equipment necessary to provide the show requested.
  + “Conference call”-style interactive presentations and dry runs, if any are planned.

# NAIL DOWN DATES AND HEADCOUNT

Before anything else can happen, you need to nail down with the KO the date and capacity of the Konferenco, the date that event registration will begin, how many staff are needed, and how many guests of each type (student, general, platinum) sum up to capacity. The first Konferenco was around 115-120 people and a handful of staff in June. The Steering Committee will largely decide these (taking into account other major calendar events).

* **What you can do:**
  + Send the KO a list of possible venues would save some steps in their job.
  + Providing an estimate while compiling such a list is also a load off the KO’s plate.
* **What to look for:** 
  + The KO will contact you with:
    - Local conflicts with time/space for a variety of possible dates.
    - A handful of estimates for several venues for a handful of possible dates, possibly with estimates including some variation of event capacity, and possibly with other elements bundled with the cost of the venue like catering, hotel, or AV.
  + The CC will contact you with:
    - A target number of speakers, panelists, and moderators.
    - A “first draft” of session titles and a sample schedule (which is usually very unlike the final schedule… don’t worry, it will naturally evolve as we work through the event).
* **What you need to do:** The steering committee needs to decide upon the following to send to the KO:
  + Dates of the event.
  + The date that registration will begin (t may be inevitable that this means deciding upon a venue).
  + Target number of seats of each ticket type (student, general, platinum, speaker, sponsor).
  + Target number of speakers, panelists, and moderators.
* **Keep an eye out for:** 
  + Dates where lots of venues are available and low-cost should be preferred over dates where only one venue is available... generally there won’t be much overlap between venues.
  + Unless your marketing goes differently than usual, you can assume at most 5-7% of attendees will be students, and you can assume about double this number for platinum tickets.

# SPONSORS, SUPPORTERS, PARTNERS

Begin looking for sponsorships immediately. Do not stop looking for sponsorships, even during the event. *Whenever a sponsorship is negotiated, send the negotiated information to the KO along with the contact information for the sponsor.*

Corporate sponsorships, non-profit supporters, and media partnerships go a long way with a small conference like the Konferenco. The SC will largely be responsible for soliciting and negotiating with sponsors, supporters, and media partners, but the KO may be finding sponsors also. If the event is being hosted by Colorado Crypto Cons, CCC issues invoices to the sponsors and collects the money.

**What to look for:** Your KO may ask about coffee or catering sponsorships. Try to find local restaurants, breweries, dispensaries, or coffee roasters to sponsor the all day drink service or snacks for your Konferenco, in exchange for special mentions and logo placement throughout the event. If you negotiate such a deal, pass that information along to the KO… or just delegate this task to the KO.

**What you need to do:** First contact and negotiate with possible sponsors yourself, and then pass along the final negotiated agreement to the KO along with the contact information for the sponsor. The KO may be able to negotiate something like a coffee sponsorship without much SC guidance, but most sponsorship negotiations require some authority in decision making.

**A privacy note:** Ensure that media partners will take steps to protect attendee privacy, i.e. holding interviews in side rooms, only recording with permission, avoiding sweeping shots of the audience, etc.

**What to look for:** The KO will pass along sponsorship information to the Konferenco host (Colorado Crypto Cons or otherwise), who should sit on the SC. This host should send invoices to the KO to pass along.

**A special note about non-profit support:** Non-profit support is important but often non-monetary.

* Sometimes they will be able to send materials like t-shirts and stickers for gift bags.
* Sometimes they will be able to fit sponsorship into their budget as part of their mission.
* Sometimes they won’t be able to spend resources on the Konferenco at all, when it is either out of their mission or when a member of their organization would financially profit from such an expenditure of funds.
* Non-profits usually just want table space for promoting their mission, are usually extremely tight on budget, and are happy to volunteer to help on event day; consider providing table space and a free ticket to one or more interested non-profits.
* Non-profit participation ended up being both nonmonetary and critical to the success of the Monero Konferenco. We recommend thinking outside the box with non-profit support.

# DETERMINE TICKET MANAGEMENT

**What you need to do:** Indicate to the KO which ticket management system to use.

**What to look for:** The KO will send you estimates of several ticket management systems using the target headcount numbers. In addition to budgetary considerations in the estimates provided by the KO, take the following into consideration.

* Big Neon:
  + Very convenient and slick to use.
  + Easy for conference registration, good practical face-to-face experience with the app.
  + Big drawback: you gotta download the app. Plus side? The app doesn’t need permissions and isn’t malware.
  + Competitive-to-expensive in fees vs. other paid services; ticket fees here may drive a budget into the red.
  + Mixed bag when it comes to paying with crypto? Need more info.
* Tari
  + Doesn’t exist yet.
  + Will be slick, easy to use, and associated with nice blockchain memorabilia.
  + Will be easy to use with Monero, but again: you have to download the app.
  + Will likely be competitive-to-expensive in fees.
* Eventbrite
  + Reliable, good reputation
  + Competitive in fees
  + Sort of boring, not (yet?) integrated payments with crypto.
* OSEM.io
  + Open source software, so no fees except payment processing.
  + Complete unknown re: performance. We haven’t used it. If the KO wants to use it, some estimate of overhead in terms of manpower should be provided to justify.
* Previous Konferenco back-end
  + Buggy software written too quickly, lots of room for improvement.
  + Already written and free. No fees except payment processing.
  + Interacts with Stripe and Globee.
  + Using serverless approaches and cheapo emails, we paid only for the back-end development, no maintenance.
  + Not robust enough yet to be reliable.
* Homebrew
  + This project can only reasonably be undertaken in six or more months.
  + Should not be undertaken unless the homebrewed system will be used many times.
  + Inevitably has unforeseen web development costs that probably won’t justify the fees paid to Eventbrite or Big Neon.

# DETERMINE AIRFARE ASSISTANCE

Sometimes sponsors will specifically make a donation to cover airfare assistance for speakers, or lodging, or with some other caveat attached to the donation. Sometimes this assistance is worked directly into the budget, like at the first Konferenco.

Regardless, the SC should consider budgeting at least some speaker airfare and lodging assistance. In the first Konferenco, we had at least one speaker who could not attend without assistance, and that talk was one of the top talks of the entire event; moreoever, someone hard up for cash can probably benefit from being on stage with big names in crypto more than someone who is flush.

**What to look for:** The KO will send you an estimate of cost for complete speaker airfare assistance.

**What you need to do:** Indicate the details of airfare assistance to the KO.

* How is assistance to be decided?
  + The first Konferenco, all speakers had free aifare and lodging.
  + Some conferences hold a lottery to help speakers to be fair and to avoid the appearance of paying for a high quality speaker to attend.
  + Some conferences do this on an as-needed basis as speakers ask for assistance.
  + Some conferences ask speakers to indicate whether they need travel assistance on their registration (similar to food preferences for the speaker dinner to avoid food restrictions) so all speakers have a chance at responding “yes” and don’t need to ask.
* How much assistance is to be provided per speaker?
  + Some conferences cover travel up to a flat amount.
  + The first Konferenco, we budgeted a flat amount as an average, and the cheap flights made up for the expensive flights in the average, leaving a few extra dollars left over from our flight budget.
  + Some conferences will cover all travel up to a certain amount for sufficiently short flights, and will cover an additional cost for travel for longer flights.
* Total description of what to include under airfare assistance under the projected expenses of the budget.

# DETERMINE VENUE

**What to look for:** The KO sent you venue estimates already when you selected dates. You may have already selected a venue when you selected the date. If any choices remain, you can leave it up to the KO or you can decide upon the venue yourselves.

**What you need to do:** Direct the KO which venue should be added to the budget and reserved, or direct the KO to decide themselves.

**A word to the wise:** Some or all of A/V, hotel room blocks, and catering are sometimes offered in a package bundled with space rental at hotel venues. This can seem like a deal because it generally reduces venue rental costs, but this can be a bad choice for the budget and planning in the end, because you have to start thinking about A/V long before you need to, practically. At any rate, such venues must provide a complete estimate of their services to be considered, and an apples-to-apples comparison requires that all the choices in the comparison be comparable to each other… so you’ll need complete estimates from the other venues, too.

# DETERMINE HOTEL

This section assumes the venue is not itself a hotel. Attendees will need a place to stay: ideally someplace within walking distance, but at the very least easily commutable, preferably with public transport. Be sure to coordinate with the KO and decide whether you or they should be picking the place. If there’s one logical place, e.g., the venue is a hotel or a reasonably priced hotel is available very near the venue, then you can simply let the KO take the lead. Otherwise, it may be best for the SC to try to find a good deal more pro-actively.

**What to look for:** Make sure you get estimates from more than one hotel unless the hotel is bundled with the venue. Saving money here is critical, but is a sure-fire way to have grumpy attendees if the belt is tightened too much.

**What you need to do:** Direct the KO which hotel should be added to the budget and reserved, or direct the KO to decide themselves.

**Note:** The SC may not be budgeting for speaker accommodation. In this case, the hotel rooms are filled and paid for by the conference attendees, hopefully filling the block. On the other hand, if the SC is budgeting for speaker accommodation, this block must have enough rooms for speakers in addition to the conference attendees.

**Note:** An attrition rate of 65% means that if fewer than 65% of the block is not occupied, then the Konferenco will cover the bill up to 65% of the total block, even if rooms are empty. This guarantees the hotel at least 65% of the desired income from the block. If there is an attrition rate, we recommend using the attrition rate in the budget under projected expenses as a worst-case scenario.

# DETERMINE LODGING ASSISTANCE

Get an up-to-date speaker list from the CC via the KO. Decide whether partial or full speaker lodging assistance will be made available, to whom, and in what amounts. Direct the KO the details to be inserted into the budget. Use details about the hotel decided earlier to complete this portion.

# DETERMINE A/V

**What to look for:** The KO will send you three A/V estimates, hopefully with portfolios, unless A/V is bundled with the venue, in which case the KO will send that estimate.

**What you need to do:** Decide which A/V team to use. Direct the KO which estimate to add to the budget.

**Notes to consider:**

* With A/V, you typically get what you pay for. A two day conference can be simply recorded for $5000 USD, but it may not be great quality, you won’t have streaming, and you won’t have interactive switching between slides and speaker shots.
* Be generous with your budget here, because if A/V fails, so does everything else.
* Be skeptical here, because a lot of multi-thousand-dollar rentals can be purchased for a few hundred bucks... but on the other hand, sometimes A/V refuses to work with outside equipment for insurance reasons.
* Ensure that the KO is making A/V aware of Konferenco-specific requirements for Audio/Visual, such as no sweeping shots of the audience, no candid shots of observers, etc.

# DETERMINE CATERER

The KO will send you three estimates for a caterer, unless it is bundled with the venue. Direct the KO which caterer to add to the budget.

# FINALIZE BUDGET FOR ORGANIZER

**What to look for:** At this point, the KO should be mostly done with the projected expenses and some of the actual expenses of the budget and has sent it to you.

* The actual income section should be blank except for sponsorships that have been paid already.
* The expected income section should include the paid sponsorships as well.
* The expected income section should also have ticket sales based on the current year’s target headcount and the previous year’s ticket prices.

**What you need to do:** Go over this budget with a fine-toothed comb to ensure everything discussed was included and the budget is so far correct. The SC should now decide on ticket prices for the year and communicate them back to the KO. The two should ping-pong back and forth until the budget is approved by the SC.

# SIGN CONTRACTS, PAY DEPOSITS

**What to look for:** The KO will send contracts for the venue, the hotel, the A/V team, the caterer, and the restaurant.

**What to do:**

* Ensure contracts match expectations, and that contracted amounts are mostly in line with previous years’ budgets (or discuss amongst the SC what to do otherwise).
* You may have to have the KO justify some budget items; sometimes hotels are extremely expensive in a certain time of year, etc, and sometimes these additional costs are unavoidable. Likewise, sometimes it is difficult to book a very nice restaurant for the speaker dinner and the KO has to go for something cheaper.
* Once everything is in order, sign the contracts and send back to the KO or authorize a delegated signature by the KO or the PM.
* Add any contractual conditions with time-sensitive properties (such as a certain amount must be paid to the venue bya certain date) to your calendar, and use this calendar to confirm with the KO a day or two before each deadline.

# DETERMINE BUDGET FOR WEBSITE AND OUTREACH

**What to look for:** The KO will ask whether the promotional and outreach components of the budget should be increased from last year. Decide this based on target headcount, last years’ costs for outreach, and last years’ headcounts.

**What happens next:** Based on your decision, The KO will be sending you graphic designs from the designer for approval for things like t-shirts, mugs, toys, logos, and most importantly, the website.

# FINALIZE ATTENDEES AND VOLUNTEERS

At least two weeks before the Konferenco, your KO will reach out:

* How many volunteers are needed for the event, and how many volunteer tickets will be given away?

Moreover, the KO may reach out with an attendance problem… not enough people have bought tickets yet and your KO is panicking!

* The KO should remind unregistered speakers to register.
* The CC can consider inviting more speakers; this is difficult if the schedule is already full.
* The KO will want to reach out to locals, send out announcement emails, put up event posters around town, and spend more out of the publicity/promotion budget. The SC must decide how to handle this.

# CHECKLISTS

Here are some handy checklists; these should be edited and amended in future versions of this document, possibly with timelines attached.

* **Early-on checklist**
  + Seek corporate sponsorships, non-profit supporters, and media partners.
    - Negotiate sponsorship/partnership contracts
    - Negotiate memoranda of understanding with non-profits
    - Send negotiated information to KO
  + Decide on range of headcount and dates.
  + Decide more firmly on headcount.
  + Decide on venue, hotel, caterer, A/V, speaker dinner restaurant.
  + Decide on airfare and lodging assistance for speakers.
  + Approve budget
  + Sign contracts
  + Approve of badge, t-shirt, poster, flyer designs
  + Approve of other outreach
* **30 days before checklist**
  + Seek corporate sponsorships, non-profit supporters, and media partners.
  + Pay invoices for deposits toward venue, caterer, hotel, restaurant, and possibly A/V.
  + Pay invoices for speaker lodging assistance for the hotel room block.
* **Weeks-before checklist**
  + Seek corporate sponsorships, non-profit supporters, and media partners.
  + Pay minimums. Often venues, etc will require a minimum payment in the weeks leading up to the event and then providing a final invoice at the end of the event.
* **Days-before checklist**
  + Seek corporate sponsorships, non-profit supporters, and media partners.
  + Pay any remaining invoices.
  + Verify that everything is ready to go with the KO.
* **Day-of checklist**
  + Seek corporate sponsorships, non-profit supporters, and media partners.
* **Day-after checklist**
  + Check with the KO about all final invoices.
  + Receive final budget from the KO.
  + If you have a budget surplus, the KO will recommend:
    - Consider donating to the Monero Outreach team. They all work on a volunteer basis and none of them expect any profit from any Konferenco, but without them, the event would be bland and literally artless.
    - Consider contributing to the Monero general fund or any open funding requests.
    - Consider contributing to the non-profit supporters of the event.
    - Consider donating as much as possible to the next year’s Konferenco; it will make the sponsorship struggle much easier; hopefully we can roll over enough money from previous years to cause the cost to drop to zero.
    - Lastly and finally, if you have done all of the above in selfless amounts, then you can you consider paying yourself for your hard work.
  + Update this document :)