GUIDELINES FOR ORGANIZING AND CONDUCTING AN OPERATIONALLY-FOCUSED NWA CONFERENCE*

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1. Introduction

The purpose of the National Weather Association (NWA) Annual Meeting includes providing a themed Conference (formal presentations, training workshops, poster sessions, panel discussions, and exhibits), a forum, for sharing information and ideas and sparking local research directed toward improving hydrometeorological and oceanographic forecasts and warnings (Grice et al. 1988). After almost twenty years of such meetings, we felt it necessary to document procedures for planning, organizing, conducting, managing, and directing these operationally-focused conferences.

The checklists presented here were developed in consultation with people who have organized and conducted conferences for governmental agencies, the NWA, or other professional weather organizations. We have also served as conference chairs. These lists should be viewed as a starting point for anyone involved in future conference planning. We hope that you, as a conference organizer, will modify these lists and the information in this article to fit your conference (e.g., Department of Defense (DOD)- or National Weather Service (NWS)-sponsored technical conferences and local workshops). The recommended time-table dates should be used for early meeting or workshop preparation and implementation. Be certain from the start of the planning process that all committee members know who to contact concerning approval of purchases.

Although we have tried to cover all contingencies in this paper, we believe in "Murphy's Law" and "O'Toole's Corollary." Whereas Murphy believed that "if anything could go wrong, it would," O'Toole noted that Murphy was "... a bit on the optimist side ...". Thus, you have to capitalize on good sense, coordinated planning and flexibility. We trust that you will modify the information in these checklists based on your unique situation and experiences.

This article has been designed for easy photocopying, and it represents a synopsis of the total conference materials on file at the NWA Headquarters. If you are planning to chair a conference, contact NWA Headquarters to obtain a copy of these materials. They are available in hard copy or in IBM-PC WordPerfect (5 1/4" OR 3 1/2" diskette) or Macintosh Microsoft Word format (3 1/2" diskette). If you desire information in diskette format, please provide a formatted diskette with your request. During and after your conference, share your experiences with the authors and NWA Headquarters so that these materials can be updated.

As you organize your conference, involve both experienced people and novices, and be sure that the workload is shared. This lessens over-dependence on any particular individual(s), builds NWA's experience pool, and increases the overall involvement and interest of NWA members. It will also gain more local members.

In addition to regular mail, facsimile, and telephone, consider using e-mail to keep in touch with others who may be working on the conference. This can speed the flow of information, as well as cut down on telephone costs.

For the purposes of this article, we've assumed that the NWA Executive Director and the NWA Council have determined the need for and recommended the location of the conference, approved a conference budget, and established registration fees (e.g., single day, student, member and corporate). These aspects of the conference will not be discussed here, but they will be included in the checklist for continuity.

We will use the following abbreviations for responsible committees and individuals throughout this article:

ED	NWA Executive Director/NWA Council
LAC	Local Arrangements Committee
LACHAIR	Local Arrangements Committee
	Chairperson

PC Program Committee

PCHAIR Program Committee Chairperson

PRES NWA President

SCHAIRS Session Co-chairpersons

2. Pre-Conference Planning Checklist

We have developed the following pre-conference planning checklist. This addresses activities that may be required as much as two years ahead of the conference. Our watchword

^{*}In this paper, the term CONFERENCE will be used to mean any type of meeting or workshop.

has been that early is better than late! Thus, the suggested times are what we feel are the MINIMUM lead times.

Lead Time

Activity

24 months

- ED determines and announces at the Annual Conference tentative locations, dates, and themes of the upcoming two conferences.
- —ED checks calendars of key DOD meteorology and oceanography offices, NWS Regional and National Headquarters, AMS and others to avoid holiday, special event, and other possible meeting conflicts.

22 months

- ED finalizes and publicizes in various NWA publications the location and dates of the upcoming two conferences. This should also be done by electronic mail (e-mail) messages to appropriate bulletin board systems and individuals.
- ED considers possible constraints on travel and meeting location sites (ongoing).
- ED coordinates with local convention bureaus, local NWA members and others to determine and resolve potential meeting conflicts.

16 months 12 months

- ED begins to contact corporate exhibitors.
- PRES appoints program chairperson (PCHAIR) if not accomplished earlier.
 Announces this at Annual Conference.

10 months

- PCHAIR appoints a local arrangements chairperson (LACHAIR).
- PCHAIR and LACHAIR work with ED and PRES to determine candidate hotel and meeting sites.
- —consider quality, price, seasonal factors that could affect room availability, ease and cost of transportation from nearby airports, hotel amenities (e.g., free local calls, access to a modem), and proximity to restaurants, shopping, recreation and key facilities of interest to attendees. Check with local convention bureau or chamber of commerce for additional information. Although conference vendors will likely have real-time weather displays, conference attendees also like to have access to The Weather Channel back in their rooms.
- ED and LACHAIR ensure that hotel has adequate space for main sessions, special (e.g., poster) session rooms, a press media room, an evening banquet, and regular luncheons and dinners.
- —The main conference room (large enough to handle expected attendees) should have as many of the following attributes as possible: be wide rather than deep, tall, easily accommodate tables, allow for large screen projection, have separate lighting/dimming controls for front and rear lighting banks, have easily accessible electrical outlets, have a flexible, good quality sound system, and have an easily controlled heating and air-conditioning system.

- —There should be adequate space for registration, displays, breaks and mixing. Coffee breaks should be held in or near the vendors display area. Provide places for small groups of people to sit and meet.
- —There should be a secure area/room in which to store audiovisual equipment and other materials
- —If possible, the conference hotel or a nearby business should have word processing, photocopy, and facsimile services available.
- —The hotel should handle all room reservations provide periodic reservation summaries to NWA, and coordinate frequently with designated NWA officials.
- —ED negotiates refreshments, audiovisual equipment, banquet and/or luncheon menus, room arrangements, and other items with the hotel. Try to arrange for small, hand-held laser pointers and cordless microphones.
- —ED ensures that the hotel restaurants will be adequately staffed to handle breakfast and luncheon rushes.
- —ED approves hotel site, signs a contract, and reserves an appropriate block of rooms.
 - NOTE: be careful about committing to a facility that requires a large financial payment in advance or has a penalty if the conference is canceled or attendance does not meet expectations.
- PCHAIR selects a 4 to 6 person working Program Committee (PC). Ensures that governmental, broadcaster, university and private sector meteorologists are represented. Includes both experienced and inexperienced people.
- LACHAIR selects a 4 to 6 person working Local Arrangements Committee (LAC) to address requirements for registration, audiovisual support, media activities, commercial exhibit support, and for acquiring real-time weather data for daily weather briefings at the conference site. Ensures that local governmental, broadcaster, university and private sector meteorologists are represented. Includes both experienced and inexperienced people.
- LAC obtains information and a black and white scenic or tourist-type photograph from local convention bureau for use in conference publicity (i.e., in a Meeting Announcement in the NWA National Weather Digest).

8 months

• PC (working with PRES) writes and publishes a "call for papers" in both the NWA National Weather Digest and the NWA Newsletter. The information should also be distributed via bulletin boards, e-mail (including services such as Internet, Genie, America On-Line, Prodigy and Compuserve), and newsletters and journals of other organizations. To facilitate processing and later publication of papers, request that abstract

submissions be made in both hard copy and electronic format (e.g., floppy disk or e-mail). Include a description of the local climatology, airline and local transportation, the name and telephone number of the conference hotel, and information about restaurants and points of interest.

- —Include information about special focus sessions, preferred session topics, abstract requirements, deadlines, the conference site, any workshops or training sessions offered, and conference dates. A reasonable abstract submission date is about 4–6 months before the conference. Since the Conference banquet is the Annual Awards Banquet, include information about NWA Annual Awards and encourage nominations.
- —In addition to routine distribution, copies should be sent to universities which have programs in meteorology, the atmospheric sciences, hydrology, climatology, oceanography, and related operational areas; governmental agencies; and businesses which provide weather or weather-related services. This includes NWS and DOD National Headquarters, NWS Regional Headquarters, other professional associations, and other organizations maintained on a special mailing list(s). This includes using e-mail. Request re-distribution of the "call for papers" and the "call for NWA awards nominations" to other organizations and agencies.

5 months

- PC, under the guidance of the PCHAIR and the heads of various NWA committees, actively solicits workshop leaders, papers, guest speakers and session chairpersons. Coordinates with PRES and ED. PCHAIR pairs experienced and inexperienced people as session co-chairs (SCHAIRS).
- —PC blocks time in the draft Conference schedule for training (workshop) sessions on two afternoons. Organizes several workshops for these trianing sessions; repeats workshops to limit attendance at each workshop, while allowing people to select workshop(s) of their choice. Instructors of these sessions should provide a less formal and more interactive atmosphere than regular conference presentations. Plan for several breaks within each half-day training session.
- —PCHAIR coordinates with head of the Broadcast Committee concerning Broadcaster training sessions and overall conference training sessions.
- PRES arranges for conference keynote speaker. ED and PRES arrange for banquet speaker.

4 months

 PCHAIR quickly acknowledges receipt of abstracts. This should be done on an on-going basis, as abstracts are received. PCHAIR and PC should agree on procedures for accepting/ rejecting/ or modifying submissions. Modifying might include moving a paper from a poster session to a formal presentation. PCHAIR then shares submissions with PC and requests recommendations for organizing the conference. This includes assigning papers to a mix of formal presentations, poster sessions and computer demonstrations. Unless absolutely necessary, encourage PC not to consider holding parallel sessions.

- —Allow approximately 15 to 20 minutes per formal presentation (including several minutes for questions and answers). Keynote, invited, and other special presentations should be allowed additional time. It is not necessary for poster session presenters to introduce their presentation. The SCHAIR can display listings of presentations using an overhead projector at the start of the poster session or at the end of the session just prior to the poster session.
- —To account for last-minute cancelations, designate several Poster Session papers as "reserve" for formal presentation each conference day. Make certain the appropriate authors can accomplish this.
- —As appropriate, organize panel discussions. Limit time for formal remarks to 5 to 8 minutes per panelist and provide ample time for audience participation and group discussion.
- —Schedule PC and LAC to make announcements at beginning and ending of conference day.
- —Allow ample time for breaks (so that attendees can mix).

90 days

- PCHAIR sends out acceptance letters (including the time allotted for the presentation). PC completes review of abstracts and PCHAIR organizes final conference program. PCHAIR publishes and distributes conference program.
- —PCHAIR sends out acceptance letters (including the time allotted for the presentation). Included are detailed instructions concerning presentation and audiovisual guidelines (e.g., see Mogil 1988), an audiovisual request form (to be returned to LAC), a floor plan (with dimensions) showing main conference room, and a letter encouraging speakers to provide copies of their papers at conference and/or publish them in the NWA National Weather Digest, agency technical report, or in other publications.
- LAC begins making banquet plans. Coordinates with ED, PCHAIR, PRES and NWA
 Awards Committee Chairperson. Considers seating, awards ceremony, nominating committee and other reports, and various speeches. Ensures room layout will allow for videotaping the banquet speech (if desired).

75 days

 PC, ED and PRES develop strategy for obtaining national and local media coverage. 60 days

- PC works with LAC, NWS and military public affairs offices and others to arrange for media coverage.
- —Draft and coordinate press releases, arranging for interviews with key attendees. Clear with people before offering them as interview subjects.
- Update previous year's distribution list of press release contacts.
- LAC collects audiovisual requests. Considers backup equipment requirements and two message boards and easels for registration area.
- —LAC recommends program changes to PC to concentrate rental of expensive equipment (e.g., large screen monitors, easels) on a limited number of days and/or to minimize set up/take down time.
- —LAC works with local NWA/AMS Chapters, universities, local and national companies, and weather groups to obtain audiovisual equipment and support during conference. Obtains appropriate release/receipt forms from those who donate use of equipment.
- —LAC develops set up plans for the various conference rooms, including placement of audiovisual equipment, chair and table arrangements, and lighting requirements.
- —LAC actively solicits support staff to set up, operate, and secure equipment each day; control lighting; and provide for the timing of presentations. Local Toastmasters clubs or universities with meteorology departments may be able to provide timing lights or other assistance.
- —LAC and ED work with corporate exhibitors and hotel and/or local conference support companies to obtain vendor display support (e.g., telephones, computer hookups, easels, booth tables, chairs and curtains).
- —LAC obtains a stock of blank overhead transparencies, slide trays, poster boards, pins, pencils, pens and other expendables which may be needed by presenters.
- —LAC obtains ED approval concerning rental of audiovisual equipment and other conference support materials.
- PC, ED, and PRES develop procedures for encouraging submission of presentations to a pre/post conference volume, as appropriate.
- PC prepares conference program booklet. This includes the program schedule, brief abstracts, a listing of presenters (with addresses and telephone numbers), and other pertinent information. ED arranges for publication.
- LAC and ED distributes local information package and conference program to appropriate speakers, SCHAIRS, pre-registrants, and others. Package should again include information about the local climatology, air-

line and local transportation, the conference hotel, restaurants and points of interest. Include a hotel telephone number at which messages for participants can be left.

30 days

- PC and LAC update previous year's conference evaluation form to ensure that all aspects
 of the conference are examined. Print enough
 copies for use at the conference.
- LAC establishes procedures to be followed regarding audiovisual support during conference. Updates "fact" and "assignment" sheets for those providing audiovisual support.
- LAC, working closely with local NWS office, distributes pre-coordinated press releases to local and national media. Follows up with phone calls to further encourage and arrange for media coverage.
- LAC ensures that photography support (black and white prints) is available at the awards ceremony and for candid conference shots. Some photographs will be likely used in the NWA National Weather Digest. (Note: LAC should (if possible) post some real-time candid photos taken during the conference on the announcements board).
- LAC obtains two message boards on easels for the registration area and ensures that registration area (e.g., tables, chairs, typewriter, personal computer and printer, name tags) is ready.
- PC contacts authors to determine their participation at conference. Then PCHAIR contacts reserve paper authors to determine if they will be at conference, requesting participation if any papers have been withdrawn.
- PCHAIR sends session schedule and associated abstracts to SCHAIRS so they can plan introductions, discussions, and questions.

10 days

• LAC prepares name tags for pre-registrants, speakers, session chairs, and program and local arrangements committees. Individual's name should be in bold type, with organization information and city (smaller type) included. To facilitate registration (and pre and post conference bookkeeping), a personal computer and laser printer should be used.

3. Planning Checklist During Conference

Planning for the conference is a major effort, but carrying it out can be an even greater one. This is because when "crises" arise, they must be dealt with quickly and successfully. The following checklist should help you minimize the need to effect "crisis management."

a. LACHAIR

- Ensures that registration area is set up to facilitate a flow of participants. Includes computer support for printing name tags and handling other administrative tasks.
- Makes administrative announcements at beginning and ending of each day.

 Manages the announcements board, posts daily program and any program changes.

b. LAC

- Distributes registration package and conference evaluation forms.
- Assists in greeting and registering attendees. Collects fees and handles sale of NWA publications. ED collects revenues several times each day.
- Establishes and operates a "ready room" for assembling posters, previewing slides, and storing audiovisual materials.
- Handles telephone messages and posts them in timely manner on the message boards. To facilitate finding messages, the board should be divided at least into 4 sections, each covering a portion of the alphabet.
- Alerts session chairs of coffee break arrangements and times.
- Ensures smooth traffic flow at coffee breaks.
- Reminds attendees that sessions are starting.
- Collects tickets at banquet.
- Handles media arrangements.

c. PCHAIR

- Is in complete charge of the conference proceedings. Ensures invited quests and key speakers are cordially welcomed and assisted as necessary. Monitors the proceedings and makes changes as appropriate.
- Arranges for daily weather briefings, if the program schedule allows.
- Meets with upcoming session chairs at end of each day.
- Makes announcements at beginning and ending of each day.
- Acknowledges publicly the support of individuals and organizations.
- Encourages participants to complete and submit evaluation forms to the registration area.
- Concludes conference.

d. PC and LAC (and others)

• should meet during and immediately following the conference to evaluate all aspects of the conference (e.g., facilities, audiovisual equipment, quality of presentations and audiovisuals, hotel services). Review conference evaluation forms daily.

4. Session Chairperson Responsibilities

The SCHAIRS of each session are the keys to ensuring maximum knowledge transfer. How they run their session (e.g., timeliness of presentations and procedures for involving the audience) will frequently become the framework by which attendees rate the overall conference. The guidelines presented here are designed to help SCHAIRS in their roles.

- Coordinate with co-chair of your session. Consider splitting responsibilities for introducing and summarizing papers.
- Contact people in your session several weeks before conference to learn about their paper and confirm audiovisual requirements. Be sure you can pronounce their name correctly. Encourage them to prepare and use easy to read audiovisual materials.
- Coordinate with LAC regarding requirements for lighting and timing. Darken front of room only, if possible.

- Meet with upcoming presenters and audiovisual support staff at least one hour before their session. Discuss presentation and audiovisual guidelines, collect and load slides and videotapes, explain operation of microphone and pointer, and verify that all equipment is functioning properly.
- Introduce speakers, tying them to previous papers in the session, whenever possible. Keep introductions brief.
- Ensure that speakers begin and finish on time!
- Adjust equipment as necessary to ensure attendees receive the full presentations. As a last resort, quietly interrupt speakers, if necessary, asking them to turn more to the audience or speak louder.
- Foster discussion at the end of each presentation. If audience participation isn't forthcoming, be prepared to start the discussion yourself. You can also arrange for an expert in the audience to serve as a catalyst for discussion.
- Provide a one paragraph summary for each presentation in their session to PCHAIR for inclusion in a NWA National Weather Digest article about the conference. This should be submitted within a month following the conference. Ideally, it should be provided to the PCHAIR at the conference (even if in handwritten format). This ensures that this "small but important task" doesn't get buried upon returning to work.
- Recommend to PCHAIR selected papers for possible submission to the NWA National Weather Digest.

5. Speakers Responsibilities

If the SCHAIRS role is to make the session flow smoothly, then speakers share that responsibility. They need to be ready to present and have their presentations honed to a rigid timetable. The following are designed to help speakers ready themselves for this assignment. We recognize that seasoned speakers may not need to review these guidelines. However, we feel that any speaker can ALWAYS improve his/her presentation.

- Convey your needs for audiovisual equipment, supplies, and other items to the PC, LAC, and SCHAIRS well before your session.
- Ensure that graphics are easily visible either from the back of the room or by people who are standing nearby your poster display. Consider enlarging text, maps, and graphs and/or making more vugraphs with less information on each. Remember that every single piece of information does not have to be presented on vugraphs or posters. Use color whenever possible (see Mogil 1988).
- Know the timing rules for the presentation.
- Practice your presentation prior to arriving at conference; be certain it fits into available time without extending into "question and answer" part of your presentation. Practice speaking clearly and focus on audience rather than projection screen. Colleagues, spouses and others can provide important feedback. When you arrive at the Conference, and if time permits, project slides and other audiovisuals in the actual conference room to see how they will appear under various lighting conditions.
- Limit the number of points you wish to emphasize based on the available time.
- Concentrate on the "meat" rather than the introduction.
- Speak clearly, speak slowly, and face your audience. YOU are the expert!
- Use as little jargon, as possible. If you use acronyms or symbols, be sure to define them.

 Limit number of visuals to about one per one minute of presentation.

 Keep within allotted time. The speakers following you will appreciate this.

 Don't thank audience for listening. The audience will thank you for your presentation with their applause!

6. Post-Conference Planning Checklist

The conference is over. "Whew," everyone says. Not so fast! There is still some work to be done. In addition to follow-up items from the conference just held, lessons learned need to be shared with ED and the PCHAIR of next year's conference. Be sure that any changes are reflected in the updated computer- and hard-copy- guidelines which reside at NWA Headquarters.

Lead Time

Activity

5 days

 PCHAIR drafts conference evaluation report. Recommends changes for future conferences and to conference checklists. Provides list of those individuals and organizations which supported the conference.

15 days

- PRES and ED write and send thank you letters to appropriate individuals, including LACHAIR and PCHAIR.
- PCHAIR and LACHAIR write thank you letters to organizations and individuals who assisted during the Conference. This includes SCHAIRS, LAC, and PC. Send copies to ED.
- PCHAIR and ED discuss plans for a postprint volume, if appropriate.
- ED updates checklists and other conference information files. Distributes updated materials to PCHAIR of next Conference.

30 days

- PCHAIR receives, reviews and edits conference session summaries and recommendations for papers to be submitted to the Editor of the NWA National Weather Digest.
- NWA Digest Editor writes to selected presenters and encourages them to submit papers.

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