CONFERENCE PLANNING eBOOK

How to organize a research conference your delegates will love.

Research Conference Planner

A research conference usually takes 9-12 months to plan and organize. It can involve hundreds of people, thousands of emails and weeks of an organizer's time. Most people who take on a conference already have a full-time day job and will have limited time to spend on organizing the conference.

Key Elements to a Successful Conference

1. Plan. Time and time again, conference organizers tell us they underestimated the amount of work involved, particularly at the planning stage. This planner will help you plan your conference and get you up and running.

2. Get help! There's too much for one person to do. Every successful conference needs an active organizing committee. Share this planner with your committee and get them involved as early as possible. It's easier to allocate roles among your organizing committee when everyone has a good overview of what's required.

3. Eliminate as much admin work as possible. An abstract management tool like Ex Ordo can reduce your admin work by 80%. You should also consider using an event management company to help with the conference logistics and local arrangements.

It's important that your committee have access to the information they need to carry out their roles. If everything is stored on your computer, it makes sharing information difficult. In an online system like Ex Ordo, the committee have 24/7 access to the conference data.

We also have a spreadsheet version of the planner,
email us at ***info@exordo.com*** *for a copy*

Research Conference Planner

How a Research Conference Works

1.

Early planning is essential. Agree conference parameters & get your team on board.

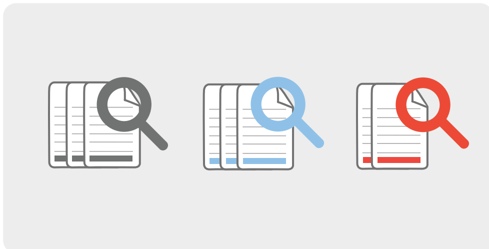
2.

Issue your call for papers.

3.

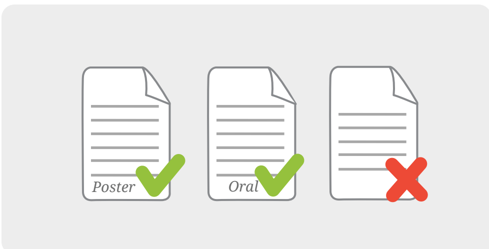
Prospective presenters submit an abstract/paper.

4.



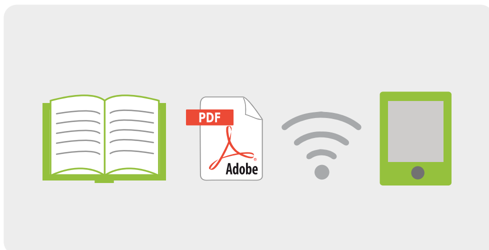
The research is peer reviewed and accepted or rejected.

5.



Conferences are composed of various presentations (20mins) and a discussion.

6.



The work may be published as the conference proceedings (digital/ hardcopy).

The Conference Timeline

The Conference Timeline is a calendar of the major milestones for your conference. Our timeline is for a conference that takes place 12 months from now. You'll see that the milestones are mostly research-related, as these are the milestones that researchers are most familiar with. We have included some of the local arrangements in the task detail - you should double-check these with your local co-ordinator.

Month

Start Planning	**1**	
	2	***Planning Complete***
Launch Conference Website	**3**	*Issue Call for Papers*
Invite reviewers to participate	**4**	
Close Call for Papers	**6**	
Open early bird registration	**7**	*Begin peer review*
Peer review ends	**8**	*Accept/reject abstracts. Notify authors.*
Receive copyright, final versions	**9**	
Close early bird registration	**10**	*Create conference timetable*
Print hardcopy book/ Publish Digitally	**11**	
Conference Day	**12**	*Close registration*
Post-Conference Meeting	**13**	*Final report/handover to incoming chair*

When scheduling your conference, start on the conference day and work backwards. Make sure there is enough time to complete each milestone. Include some contingency in case you have to extend a deadline e.g. if you haven't received enough abstracts on deadline day. Remember to factor in extra time for holidays and other times when it's harder for committees to meet and for authors and reviewers to meet deadlines.

Researchers are good at research, not event planning! If you're organizing a event with more than 50 delegates, consider working with an event professional to help with local arrangements: venues, food, accommodation, registrations, tours, IT/AV etc.

Month 1- Initial Planning & Setup

Milestone: Start Planning

There's lots to do at the beginning so we recommend you start planning as early as possible. If the conference has taken place previously, make sure to get as much feedback as possible from the previous committee. Incorporate any recommendations into the thinking for your conference.

- [ ] Form your steering group and committees and decide who is responsible for the following areas:
    - developing the conference programme
    - dealing with technical sponsors
    - publishing the proceedings of the conference
    - conference website and promotion
    - issuing the call for papers and collecting the abstracts/papers
    - communicating with authors, reviewers and delegates over the life of the conference
    - selecting and coordinating reviewers
    - inviting and managing keynote speakers and VIPs
    - registering and accepting payments from delegates
    - fundraising and dealing with financial sponsors
    - financial accounting
    - venue selection, all local arrangements
- [ ] Establish conference title, theme and topics.
- [ ] Contact the appropriate technical sponsor or organizing sponsor and agree any procedures that they require.
- [ ] Agree the format for the initial submissions from authors: e.g. abstracts, papers, or abstracts first and papers later.
- [ ] Decide how authors will present their research at the conference: (Oral/Poster/Workshop/Roundtable/Panel etc)

- [ ] Draw up a rough conference timetable.

Decide on how many days the conference will run for. Estimate the number of presentations and sessions you'll have. Slot in time for registration, keynotes, dinners and other activities to give a preliminary timetable.

- [ ] Establish conference dates.
- [ ] Ensure that presentation venues are available on these dates.
- [ ] Check hotel availability.
- [ ] Estimate how many reviewers you will need and draw up a list of potential reviewers.
- [ ] Establish a preliminary conference budget and the registration fees (early/late/student).
- [ ] Decide how you will accept payments from delegates.

Ex Ordo's integrated registration system eliminates duplication – authors can submit research and register for the conference using a single account.

- [ ] Decide on the structure of the conference website and the social media tools you will use.
- [ ] Collect the information for the conference website. Decide who will build the website.
- [ ] Once you have agreed the main parameters for the conference, consider if you need outside help – e.g. a professional conference organiser, to help with local arrangements.

Month 2 - Initial Planning & Setup (ctd.)

Milestone: Planning Completed

- [ ] Finalise the important dates for the conference.
- [ ] Invite potential keynote speakers.
- [ ] Compile the mailing list of authors for call for abstracts / papers.
- [ ] Choose any sub-topics/themes, decide if there will be single or parallel tracks.
- [ ] Identify and purchase your abstract management system (e.g. Ex Ordo).

*If you would like a demo of Ex Ordo, please **email us** or try Ex Ordo yourself with our **15-day free trial***

- [ ] Hire your conference office or event management company (if required).
- [ ] Finalise a budget for the conference.
- [ ] Identify potential external sponsors and file funding applications to outside sources, if needed.

- [ ] Design and populate the conference website and setup the social media accounts for the conference.

- [ ] Decide whether proceedings will be published in digital or hardcopy format.

Printing costs can be substantial, so if you decide to publish in hardcopy make sure to include in your budget. Ex Ordo's digital publishing system eliminates the cost of printing.

- [ ] Prepare and publish conference brochure (if required).

Month 3

Milestone: Launch Conference Website

Milestone: Issue 1st Call For Papers

- [ ] Launch the conference website and announce it on social media. Remember to promote the conference on social media over the life of the conference.

- [ ] Issue your 1st Call for Abstracts/Papers. Finalise the mailing list of potential authors and invite them to submit to your conference.

With Ex Ordo, authors submit directly online, not to your inbox. They follow your submission template, so all submissions are standardised. Authors are automatically notified when submissions are received.

- [ ] Issue additional Calls for Papers (e.g. every 3 weeks) to remind authors where necessary.

- [ ] Finalise outside funding sources/sponsorships arrangements and any technical sponsor details.

- [ ] Ensure that any specific publisher requirements are considered.

Month 4

Milestone: Invite Reviewers to Participate

Finalise how many reviews each submission will receive – this will influence the number of reviewers that you will need. Make sure you allocate adequate time for the review process. For example, say that you receive 300 abstract submissions, have 60 reviewers and that each submission should get 3 reviews:

1. *300 submissions x 3 reviews per submission = 900 total reviews*
2. *With 60 reviewers, each reviewer will average 15 reviews*
3. *If a reviewer can review 3 submissions in a week*

You need to allow a min of 5 weeks, plus 2 weeks for contingency.

- [ ] Email your list of reviewers asking them to participate.
- [ ] Issue your Final Call for Abstracts. Be prepared to extend the submission deadline if you don't think you'll have enough submissions by deadline day. (Make sure you have allowed enough time for this before reviewing begins).
- [ ] Contact hotels and put a preliminary hold or booking on rooms.

Month 6

Milestone: Close Call for Papers

- [ ] Revise Budget – e.g. have sponsorship goals been met?
- [ ] Issue a 2nd invitation to reviewers if the number of participating reviewers is low. Be nice – remember that your reviewers are busy and are giving their time voluntarily!
- [ ] Finalise keynote speakers.

Month 7

Milestone: Begin Peer Review

Milestone: Open Early Bird Registration

- [ ] Allocate abstracts to reviewers. **EX ORDO 1-CLICK FEATURE**
  Factor in the number of abstracts and reviewers you have, how many reviews each submission should receive, the maximum number of reviews per reviewer, the topics chosen by authors, areas of reviewer expertise, and that reviewers should not allocated papers from authors in their own institution. Ensure that the review process is blind/double blind and that reviewers have a common, consistent way of grading abstracts.
- [ ] Provide reviewers with a standardised online scoring mechanism to ensure consistency of grading.
- [ ] Issue reminders to reviewers to complete reviews (e.g. 2 weeks after allocation).
- [ ] Set up your registration and payment system, with options for early bird and standard rates, workshops, accommodation, dietary requirements, etc.
- [ ] Send an invitation to the conference mailing list inviting authors and non-authors to register for the conference.

Month 8

Milestone: Peer Review Ends

Milestone: Accept/Reject Abstracts. Notify Authors.

- [ ] Close peer review, making sure that all reviews have been completed.

- [ ] Make final decision on which abstracts to accept and which to reject.
- [ ] Notify all authors with decision, individual reviews and comments. **EX ORDO 1-CLICK FEATURE**
- [ ] Invite accepted authors to submit copyright disclaimers, final version and source files.
- [ ] Request biography and presentation materials from authors.
- [ ] Re-invite the accepted authors to register - they must attend to present their paper.
- [ ] Compile list of other VIPs and invite.
- [ ] Decide on gifts for keynote speakers and VIPs.
- [ ] Research food arrangements and audio-visual service; make commitments where necessary.
- [ ] Invite session chairs to participate.

Month 9

Milestone: Receive copyright, final versions

- [ ] Ensure that all authors have submitted copyright declarations, final versions (revised abstract, full paper) and any source files required.

Month 10

Milestone: Close Early Bird Registration

Milestone: Create Conference Timetable

- [ ] Order supplies for the conference day: name tags, pads, pencils, folders etc.
- [ ] Issue reminders to invited delegates who haven't paid.
- [ ] Create your conference timetable so that delegates can see the programme detail and decide which sessions to attend.

> *With Ex Ordo you share the conference timetable online. You can amend the timetable right up to conference day, so it is always up to date.*

- [ ] Finalise on-site staffing requirements (voluntary and paid) e.g. registration staff, runners, exhibit coordinators and assigned personnel for Keynote Speakers and other VIPs.
- [ ] Update hotels on room numbers required.
- [ ] Meet and confirm venue, catering, audio visual and IT equipment with suppliers.
- [ ] Contact sponsors and agree arrangements for exhibits, funding etc.
- [ ] Decide on materials to be included in delegate packs and arrange delivery.

- [ ] Decide on gifts for Keynote Speakers and VIPs.

- [ ] Prepare to Publish.
  If you're producing a hardcopy for print or a PDF for the website, your will need to prepare a PDF proceedings. This involves formatting and ordering abstracts/papers according to the conference programme, adding page numbers, headers, footers, building a table of contents, creating an author index, adding foreword & sponsor pages, designing a cover and converting to PDF.

Month 11 - 4 weeks to go

Milestone: Print the Hardcopy Book / Publish Digitally

- [ ] Send the book to be printed or publish the PDF.

- [ ] Alternatively, publish the proceedings digitally.

EX ORDO 1-CLICK FEATURE

> *Ex Ordo's Digital Publishing platform eliminates the cost of printing and the time spent designing and formatting a hardcopy book. Publish the proceedings online, viewable and searchable on the web or tablet. Automatically link the conference programme with author, abstract, paper and presentation material to create a rich set of digital proceed-ings.*

- [ ] Arrange airport/ground arrival arrangements for keynotes and delegates.

- [ ] Order the necessary signs and banners.

- [ ] Meet with parking security and parking officials to arrange local logistics arrangements.

- [ ] Send delegates information regarding agenda, accommodation, banquet dress code, travel arrangements, parking and contact details for conference contact staff.

- [ ] Confirm number and details of delegates with hotel, caterers, tour operators etc. Include any special dietary requirement or special needs arrangements.

2 weeks to go

- [ ] Arrange for gifts for Keynote Speakers to be delivered.

- [ ] Organize storage space for conference materials. Get all required material (e.g. for registration packs, gifts etc) sent to conference site.

- [ ] Arrange for any poster presentations to be printed off.

1 week to go

- [ ] Get session chairs to check that all presentation material from their presenters is available.

- [ ] Check weather forecast – do you need a backup plan?

- [ ] Prepare registration packs, name tags for delegates.
- [ ] Organize facilities for accepting payment at registration desk (if needed). If accepting cash, ensure that you have receipt books and change available.
- [ ] Double check the arrangements for VIPs and those with special needs.
- [ ] Meet all conference personnel and run through the conference day agenda. Circulate important contact numbers to the conference staff.
- [ ] Confirm registration desk and information point setup (personnel and equipment). Make sure that registration desk and information point on the day are staffed by friendly and helpful people.
- [ ] Handover delegate list to registration staff.
- [ ] Get hardcopy proceedings and poster presentations delivered to conference site (if required).

3 days to go

- [ ] Set up and check conference computers, projectors and any other equipment such as poster boards for poster presentations.
- [ ] Download all presentation material **EX ORDO 1-CLICK FEATURE** and transfer to the conference computers. Ensure that all presentations are working and that all material is accessible.
- [ ] Check audio-visual arrangements.
- [ ] Check arrangements made with campus security and parking/transport officials.

1 day to go

- [ ] Arrange for VIPs to be picked up and brought to hotel.
- [ ] Check session rooms for cleanliness and necessary supplies.
- [ ] Mount all posters in the poster display venue.
- [ ] Mount signs and directions inside and outside the venue.
- [ ] Arrange the Reception Area – desks, name badges, registrant packs, cash box/credit card facility, delegate lists, etc.
- [ ] Arrange the Information Point, make sure it is easy to find.
- [ ] Update online programme timetable with any late withdrawals.

Conference Day has arrived

Milestone: Conference Day Has Arrived

- [ ] Welcome delegates on the day, handout name badges and packs.
- [ ] Complete any outstanding registration payments.
- [ ] Close off registration process.
- [ ] During the conference, present gifts to Keynote Speakers and VIPs.
- [ ] Hold the Steering Group meeting to review conference.

After the Conference

Milestone: Prepare the Final Conference Report

- [ ] Send proceedings to publishing house (if required).
- [ ] Review all invoices for accuracy and arrange payment.
- [ ] Collect any monies outstanding.
- [ ] Prepare a full report for submission to funding sources and for internal use.
- [ ] Review the delegate survey and any other evaluations.
- [ ] Review the end of conference report from your abstract management tool.
- [ ] Export settings from your abstract management tool for next year's conference.
- [ ] Send a thank you email to delegates, staff/volunteers, VIPs and Keynote Speakers.
- [ ] Finalise conference detail, including budget and financial information, conference survey results, meeting notes. Include suggestions and recommendations for the incoming chair.

That's It! Congratulations on running a successful conference!

Ex Ordo can eliminate 80% of the admin work and save thousands in print costs.

Get a live demo of Ex Ordo here