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This model focuses almost entirely on the volunteer and contractor portions of conference administration. The general roles of the three areas addressed in this report are as follows:

- **Volunteer oversight:** This includes financial oversight, volunteer personnel development, conference program development and implementation, contractor assessment, strategic planning and its implementation, and multi-year issues. This oversight is provided by the Conference Chair, the Conference Advisory Group, and the ACM SIGGRAPH Executive Committee.

- **Administrative services:** These services include support for all conference and conference advisory group activities and decisions, implementing decisions by the conference chair and the conference advisory group, coordinating and supervising all the operational aspects of the conference, and providing a staff of conference managers and other supporting persons. These services are provided by the contractor for Conference Administration.

- **General conference services:** These services include coordination of site selection for future conferences, local arrangements for committee meetings and the conference, registration coordination, merchandise coordination, copy coordination, student volunteers, and periodic reporting on these activities. These services are provided through a different contract than the conference administration contract.

This report includes some implementation details that might not be expected in a document describing a model. In doing so, it presents the model in both conceptual and implementation terms, which should aid in the creation of the RFPs and contracts, that will be needed to implement it.
2. Background and History of Conference Management

Initially, the annual conference was the responsibility of the ACM SIGGRAPH Vice Chair. In the early 80s, this position was split into two positions, a Vice Chair for Conferences, who was responsible for the annual conference only, and a Vice Chair for Operations, who was responsible for many other ACM SIGGRAPH activities including all other conferences and workshops. These were both elected positions to the ACM SIGGRAPH Executive Committee.

Prior to 1995, each SIGGRAPH annual conference had two volunteer co-chairs. Beginning in 1987, a conference administrator was also hired for each conference year. Oversight was provided by the Conference Planning Committee (CPC), that was made up of conference chairs for the current year, the past two years, and the future two years. The CPC was chaired by the Vice Chair for Conferences.

In 1995, the conference management model was changed to have a single volunteer conference chair and a paid administrative assistant, plus a full-time multi-year contractor, called the Chief Staff Executive (CSE) for Conferences. The company that received the Conference Administration contract provided the administrators for the annual conferences and the CSE. A Conference Advisory Group was set up, similar to the CPC, only the CSE chaired this group, was responsible for strategic planning, and was also an ex officio member of the ACM SIGGRAPH Executive Committee. The current conference chair was a voting member of the Executive Committee. The 1995 model also described conference management services.

In 1998, after a study by the Conference Management Model Review Group (CMRG), the conference management model was changed again. The 1998 Conference Management Model separated the two parts of the 1995 model (conference administration and conference management) functionally and proposed separate contracts for them. It also made changes in the specific functions of the CSE. The current makeup of the Conference Advisory Group (CAG) is given on page 3. The most significant change was to have a separate volunteer be chair of CAG. This CAG Chair is responsible for the conference strategic planning and is a member of the Executive Committee. The CSE is an ex officio member of both Executive Committee and CAG.

In 2002, this model was edited to bring it into synch with actual practices that had evolved.
3: The Role and Responsibility of the Conference Advisory Group

Membership

The CAG is comprised of the CAG Chair, the immediate past and current years’ conference chairs, any future conference chairs who have been appointed and confirmed, two representatives from the EC, and the Chief Staff Executive (as a non-voting member). Others may be invited to join CAG meetings as needed. The chair of the CAG is nominated by CAG and selected by EC vote, and serves as a voting member of the EC as well as a voting member of CAG. This person may be a current CAG member or may be chosen from among volunteers who have significant conference experience. The CAG Chair appointment is for three years. The first 3-year appointment began January 1, 2002.

The CAG Chair:

- communicates conference issues to EC
- is the primary CAG leader for strategic planning
- takes a leadership role in recruiting conference chairs and other conference volunteers.
- with the CSE, provides orientation to new conference chairs
- provides CAG meeting agendas/minutes and conducts meetings
- assists each year’s conference chair with contractor evaluations

The CSE will be a primary resource to the CAG in gathering information, researching conference issues, and supporting strategic planning. The CSE serves in an ex officio role on the EC in order to ensure a direct reporting function for the current conference.

The EC representatives on the CAG are selected by the EC and serve as voting members of the CAG. These representatives will have two primary attributes: 1) an organizational experience and point of view, and 2) enough conference experience to be able to contribute to CAG decisions.

Communication

It is imperative that the model address the kinds of communications that are needed to allow the EC to understand conference activities and issues well enough to make high-quality decisions on conference matters and to allow the CAG to make conference decisions based on the ACM SIGGRAPH strategic plan and priorities.

A standing part of the conference item on the EC agenda will be a report from the CAG Chair on current issues and initiatives from CAG, and EC members will be invited to use this time to raise questions on any CAG minutes items that need clarification. Also, the CAG will provide draft agendas for CAG meetings to the EC and the EC will be invited to communicate with its members on CAG to raise issues to the CAG. Similarly, CAG meetings will include a standing agenda item for EC communications, and CAG will be invited to communicate with its members on EC to raise conference-based issues to EC.

In addition, CAG provides communication with the SIGGRAPH community about conference activities and initiatives through such means as the conference newsletter
Responsibilities

The following is a detailed list of responsibilities of CAG. It is important that CAG communicate these responsibilities with EC, and that it set in motion the full carrying out of these responsibilities in a way that can be fully assessed by its members and by the EC.

CAG assumes a number of responsibilities in its overall role as conference advisors. These tend to be in multi-year and policy areas for the conference, and are summarized by some general areas as follows:

• Financial areas
  - oversee fee structures
  - perform detailed review of conference budget before recommending it to EC
  - request CSE to provide revenue/expense assessment as substantive information becomes available
  - monitor and assess the conference management model for review at end of each contract period
  - oversee all contract RFPs, review all contract bids, and review negotiations for contracts
  - review proposals for funding from the conference reserve

• Conference personnel
  - select CAG Chair candidate(s) for confirmation by EC
  - recruit conference chair candidates, review applications, and propose chair to EC
  Some discussion of likely candidates should take place with EC prior to this proposal.
  - participate with CSE in orientation of conference chairs
  - review conference program chair nominations and recommend technical program chairs to EC

• Conference programs
  - review all conference programs periodically for effectiveness and value, making recommendations for/against their continuance
  - evaluate cost and impact of proposed new conference programs

• Assessment
  - cultivate volunteers and provide assessment for potential conference volunteers
  - perform peer assessments to help CAG and conference volunteers function as effectively as possible
  - assist conference chair with self-assessment to help in evaluating communication with the contractors and volunteers
  - assess performance and effectiveness of CAG tasks as appropriate to the task

• Handling various issues
  - manage strategic planning and organizational planning for the conference
  - analyze and implement or recommend actions on multi-year operational issues
  - manage conference special projects
  - manage and follow through with tasks as needed for any of the responsibilities above.

Time Management

It is difficult to reconcile the clear need to keep the commitment of volunteer resources as low as possible with the need expressed in this model to affirm that the final accountability for the conference rests on the shoulders of volunteers. This is further clouded by the desire of conferences to benefit from the experience of past chairs and the desire of rising chairs to learn from the conferences under development, which is one of the major sources of the travel requirements for conference chairs.

This issue is an internal management issue for CAG. Because of volunteers’ varied backgrounds, each conference chair will likely focus on distinctly different aspects of the conference and CAG roles, while maintaining the general principle of focusing on the volunteer side and delegating various pieces of the operations side. This delegation of conference chair details to the conference administration staff is an important part of time management, allowing the Chair to collaborate with the CSE or other administration staff to achieve adequate focus on issues across the conference.

On an ongoing basis, CAG is expected to explore approaches to relieve travel commitments, including re-arranging meeting schedules, using online meeting services, and using conference calls for some of its business. Creative uses of technology can allow real-time interaction while reducing the need for travel.
4: The Role and Responsibility of the Conference Chair

Each year’s conference is characterized as a project with a stream of specific phases and deliverables. Ultimate responsibility for creation, implementation, and follow-through of each project resides with the corresponding conference chair. The conference chair succeeds in his or her task through the careful leadership and management of a conference team.

Focusing on an individual conference, the essential conference chair responsibilities are:
- develop the vision and leadership of the conference, and communicate this vision to the committee
- recruit and form a conference committee, and give it an appropriate structure
- plan and execute committee meetings, and ensure follow up of resulting action items
- ensure that there are appropriate communications at numerous levels and times
- guide, enable, and support the delivery of conference content
- provide overall committee management for areas such as budget, policy, and mentoring

The first point involves communicating to the entire conference committee what is uniquely important to the chair’s vision when the new committee is formed, including specific communications to individual members on particular issues, and refer to these communications in the end to see if their needs were truly met.

The conference chair’s commitment extends beyond the specific conference project to a guidance role in all conferences; this is a duty to the CAG function as previously described.

The authority and responsibility of the conference chair lies in a broader context of authority and accountability. Just as the CSE is delegated authority from the conference chair and is accountable to the chair, the conference chair is delegated authority from the CAG, and both the CAG and conference chair are delegated authority from the ACM SIGGRAPH organization. Thus the conference chair is accountable to CAG, and both CAG and the conference chair are accountable to the ACM SIGGRAPH EC. In cases of unresolved issues at any level, the accountability to the next level of authority means that the issue may be raised to that higher level for resolution up to the final level of the EC and the ACM SIGGRAPH President if ultimately necessary.
5: The Role and Responsibility of Conference Administration

Philosophy

The primary challenge of any conference project is balancing the relationship of opportunities with the decisions required to address them. This growing mass of details often overwhelms the capacity of the conference chair to effectively prioritize and direct everything in a timely fashion without administrative help. The other challenge to conference success is the effective collaboration between content producers (volunteers) and content deliverers (contractors). As seen below, clear communication and action must flow between all parties. If this synergy works well, then success is shared by all in a great conference event. If the synergy functions weakly, then costs mount and personal disappointment grows.

Viewing these two challenges, the essential roles for the conference administration staff emerge. The first is:

_To help orchestrate and enable effective decisions by the conference chair for successful delivery of the conference._

This means that conference administration helps to identify, monitor, coordinate, and prompt the decisions and actions that the conference chair needs to make.

In the other major role, conference administration serves the entire committee by:

_Enabling and supporting inter-program and intra-program collaboration for successful conference deliverables._

This requires gathering and distributing information, tracking issues, and facilitating solution development. It may also require problem investigation, proposing alternative courses of action, and facilitating appropriate approval processes for action.

With these roles in mind, the diagram above now becomes the following, with conference administration serving in a central role.
In this diagram, each of the lines from conference administration indicates a specific kind of relationship. The vertical line links the authority of the chair with facilitation from the conference administration. The left line links the content provided by the program volunteers with support from the administration. The right line links the delivery by contractors with coordination and functional management from the administration.

NOTE: While the figure does not address the role of conference administration with the CAG, this relationship parallels those with the chair and with program volunteers in terms of support and facilitation of CAG activities.

It is previously noted that final authority and responsibility reside with the conference chair to ensure the soundness of the decisions made relative to a conference as supported by the best information available. However, realizing the magnitude of the conference chair task, and recognizing that volunteer conference chairs most often cannot assume such full-time commitment to the conference, by necessity some level of delegation of authority to other team elements occurs. This delegation must be made explicit and must be well understood by all conference committee members so there is no confusion on critical issues. This is particularly true with respect to the conference administration function.

Staff positions

Chief Staff Executive (CSE)
The CSE role is similar to that of a Chief Operating Officer (COO) or Director (COD) position where, realistically, much autonomy and authority rests on the CSE, yet ultimate responsibility and accountability reside with the volunteer conference chair, functioning as the conference Chief Executive Officer (CEO). The CSE is the functional manager of all contractors. (Contractor evaluations are the task of the conference chair).

From a global perspective, conference administration is led by a Chief Staff Executive (CSE) who oversees the quality and completeness of the project manager's functions within each of the conference committees and CAG. The CSE works in a high-level issue-oriented partnership with the conference chair, heads up the staff support for conference administration, supports the strategic direction of the conference, and is a shared resource across all conferences and CAG. The CSE has a responsibility to provide timely information to the conference chair and CAG on any issues that may affect the ability of conference administration to provide adequate service to the conference as well as any issues that may affect the effective development of the conference program or operations. This individual needs to be able to learn quickly about ACM and ACM SIGGRAPH strategic plans and priorities and the SIGGRAPH annual conference.

CAG Support
A staff member is assigned to the CAG to provide administrative assistance in the preparation of CAG meeting agendas, minutes and other back-up as necessary. This staff member also assists in the preparation of RFPs and subsequent contracts.

Conference Managers
One conference manager is assigned to each active conference project for the duration of its activities (approximately 3 years with varying stages of time demand). This person works most closely with the conference chair and is responsible for the daily operational management of conference details.

Program Coordinators
Program coordinators (administrative assistance) work directly with program chairs. They may or may not be part of the Conference Administration contract. Some program chairs opt for local administrative assistance. However, the conference administration contractor should be prepared to fulfill these requirements if desired.

Other staff needs include accounting support and online conference information management, possibly under separate contract.,
Implementation

Conference administration, in concert with the resources of the conference committee, works to help meet the conference chair's responsibilities for developing and delivering the event. This involves many levels of detail, some of which fall to the conference chair and some to conference administration. The exact allocation of work between these areas will depend on the needs and focus of the individual conference chair, taking into account the conference chair’s background, interests, experience, and personal or professional constraints, and will likely be revised with each conference.

This section describes the support functions of conference administration in terms of the areas being supported. In doing so it does not specify how this support will be provided, because this will be part of the work allocation described above. Some general thoughts on this division will follow these listings.

Conference Support

The conference administration shall provide overall support functions for each conference project. Primary tasks include:

- Working with the conference chairs in preparing preliminary and final conference budgets for approval by the ACM SIGGRAPH EC and ACM.
- Supporting the conference chair in hiring and supervision of staff supporting SIGGRAPH conferences.
- Managing the purchase, maintenance, and inventory of all SIGGRAPH conference capital equipment in accordance with ACM policies.
- Collaborating with the conference chair to represent the SIGGRAPH conference to other organizations, the media, and the public at large.
- Coordinating a network of donors and sponsors for the SIGGRAPH conference.

From a conference perspective, each conference shall have full-time project support dedicated to administering its progress and fulfillment. Primary tasks at this level (accomplished by CSE and dedicated conference manager) include:

- As arranged with the conference chair, authorizing all financial disbursements and otherwise monitoring all financial and accounting activities of the conference.
- Facilitating communication between conference chairs, contractors, and conference committee members.
- Coordinating and facilitating all administrative and operational aspects of the conference, as well as supervising all on-site conference operational activities.
- Reporting regularly to the ACM SIGGRAPH EC and ACM to ensure that they are fully informed of all conference activities.
- Serving as primary contact and coordinator for contractors.

Additionally the conference administration must fulfill committee support functions such as:

- Working with CAG and conference chair to provide start-up briefing and materials for incoming annual volunteer conference chairs and volunteer committee members.
- Managing and maintaining on-line conference information developed by annual conference committees.
- In conjunction with the SIGGRAPH accounting contractor, providing monthly financial analyses, final conference audits and regular financial reports to the ACM SIGGRAPH EC and ACM.

Availability of program coordinators (a pool of experienced administrative staff for conference program chair support) may be requested. Familiarity with SIGGRAPH databases and policies and procedures would facilitate maximal effectiveness in supporting program chairs.)

CAG Support

CAG is considered a parallel but unique project, so it must contract services to support its activities. For the purposes of the model, we assume that all multi-year functions and all functions that interact with ACM are CAG and ACM SIGGRAPH functions, as opposed to single conference functions. The staff role in supporting this work includes:

- Working with CAG and the EC to support development of SIGGRAPH conference policies and procedures.
- Maintaining and making available, as required, all records for SIGGRAPH conferences, including all reports, agendas, contracts, surveys, databases, personnel data and any other necessary materials and communications.
- Preparing requests for proposal (RFP), supporting the selection process and negotiating contracts on behalf of ACM SIGGRAPH for approval by CAG, EC, and ACM.
• Attending all conference committee, EC, and other required meetings pertaining to the SIGGRAPH conference.
• Providing support for and participating in strategic and long-range planning efforts for SIGGRAPH conferences and implementing the conference strategic plan in partnership with the CAG.

Costs for Each Project

Because the conference administration function will support several overlapping projects at one time, it is important that we be able to understand how this effort is allocated among the projects. The contract for this function is set up on a per-project basis, and actual payments for the contract are based on actual costs for each project.
6: The Role and Responsibility of Conference Services

The Conference Services Contractor (CSC) holds primary responsibility for many detailed coordination and logistic functions related to planning and executing the SIGGRAPH conferences. A complete detailed, itemized list of activities can be extracted from past contracts but generally incorporates the following: coordination of site selection for future conferences, housing and local arrangements for committee meetings and the conference, registration coordination, merchandise coordination, copy coordination on all production printed pieces, and periodic reporting of the status of each of these activities. The general conference services functions are believed to be well established, and the remainder of this section serves as a concise summary of the conference service responsibilities.

The CSC prepares and processes RFPs for future conference site selection. They work closely with the SIGGRAPH volunteer leadership and major operations contractors (audio-visual, exhibition management and the general services contractor) to prepare appropriate evaluation and selection criteria. The CSC also acts on SIGGRAPH's behalf in all negotiations with the convention center and local housing during the site selection process.

Representatives of the CSC attend all committee meetings for each conference year to supply regular status reports on ongoing activities or arrangements. They assist individual committee members (program chairs) with planning and arrangements for their subcommittee meetings, jury meetings, and for onsite services required at the conference.

The CSC coordinates and manages all housing, function/reception service needs and local travel arrangements during the planning and execution of committee meetings and the annual conference. This responsibility includes negotiating with local housing bureaus and hotels for the best rates on rooms, receptions and services. The CSC prepares and processes RFPs for the designated conference headquarters hotel, for conference-related receptions and for the busing between conference hotels and conference functions. The CSC coordinates with the SIGGRAPH Travel & Housing contractor on related procedures and protocols in this service including car rental programs, onsite service desks (airlines, housing, restaurants etc.), and general status reporting for each of these activities. They also act as liaison between the conference hotels and SIGGRAPH's audio/visual company.

The CSC holds primary responsibility for registration activities both in advance and onsite. This encompasses all related financial transactions, development of registration procedures and contingencies, staffing and training of registration personnel, handling of general inquiries (most by phone, fax and many online requests), dissemination of appropriate conference print materials in response to individual requests (e.g. advanced announcements, CFPs, final programs), and handling VIP and special assistance needs for atypical registrations.

The CSC manages the general space allocation, assignments, scheduling and servicing in both the convention center and hotels for SIGGRAPH related activities, such as general conference programs, BOFs, or receptions. This includes the development of detailed specification documents to be followed for all SIGGRAPH-related functions. The CSC sets up, staffs and manages the conference management office onsite at the conference. Additional responsibilities include scheduling onsite security (firm to be selected by exhibition management) for registration and additional areas requested by the committee and for coordination and assignment of onsite walkie-talkies for committee communication.

The CSC works as the liaison between the committee, the design contractor and the printer for the development and production of signage onsite and for all major printed and promotional pieces (some 9 or more) for the conference, excluding ACM SIGGRAPH organization archival documents such as the Conference Proceedings. Copy coordination includes preparation of critical deadlines and timetables for document production and also incorporates managing the general dissemination/distribution of the associated printed pieces.

The CSC handles merchandise coordination for each conference. This includes coordination with the design contractor and the committee for the development of a fixed number of designated merchandise pieces to be offered for sale at the conference. The CSC is responsible for establishing procedures, contingency plans and generally for managing the acquisition, inventory, sale and distribution of these items.

The CSC assists the Student Volunteer Chair in managing that program.

Finally, the CSC provides input for development of appropriate program budgets, assists in monitoring invoices for conference related activities, and ultimately prepares a final report summarizing conference services activities and recommendations for improvement.
7: Contracts to Implement the Model

Implementation of the model is accomplished through a bid process for both conference administration and conference services. This requires two RFPs, two sets of bids, two sets of bid evaluators (possibly two bidder interviews), and two written contracts. This is a large amount of work and will require a staggered bid schedule. Development of the conference administration contract is first and the conference services model is phased slightly behind it.

Timeline
It was felt that the RFP timeline should be longer and should have two parts:
* RFQ (request for qualifications) that would allow us to identify potential bidders and bring them to the annual conference
* RFP (request for proposal for the contract)
8: Measuring the Success of Conference Administration

When the conference administration effort is evaluated each year, it is done on individual project levels (current conference, developing conference, and CAG) as well as a global level.

The individual project levels will be examined against:
• general contribution to success of chair responsibilities, especially in areas of delegation
• specific areas and objectives agreed upon at the beginning of the project, possibly the result of previous reviews
• contract-specific responsibilities, especially in areas of significant contribution or need for improvement
• relationship improvement with all contractors, both here and on all reviews.
• contract creation and flow

The global levels attempt to assess the more intangible contributions of administration services with respect to conference and organization aspects. Improvements or major achievements should be noted, especially from perspectives of the EC representatives on CAG.

The global level review should attempt also to create a composite conference administration performance assessment from the perspectives of each project managed. If major strengths or weaknesses are identified with significant commonality, they should be reported in any of this summary.

In terms of specific evaluation criteria, some might include:

• How effectively were issues requiring decisions reported? Prioritized? Resolved?
• Were financial or other resource impacts or savings made?
• What initiative beyond baseline requirements was exemplified?
• What was the quality of inter-project-year collaboration?
  • Examples?
• As facilitator of communication within the committee, what does peer feedback reflect?
• How effectively was technology employed to improve communication?
  • Was the right technology employed?
  • Was the customer enabled and satisfied?
• How effectively did the contractor enable new contractor peers to be successful in their function?
• What areas of leadership did they exemplify in the creation of the new conference program?
• What steps has the administration staff taken to improve itself in conference administration skills and in understanding the SIGGRAPH community?
• How about its idea/creativity base?
• Were new contracts clearly and correctly written, with a summary of changes from the previous contract?