

# **Growing Your Chapter: Planning and Holding Seminars and Workshops**

**IEEE-SCV Officers Training, Jan 2010**

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- **Topic**
  - Must be leading-edge knowledge that you “can’t get anywhere else” in your field, or tutorial material for advancing in your field
  - Must be “cutting edge and exciting” to attract professionals
  
- **The Speaker**
  - Must be well known or have information that is not easily obtained elsewhere
  - Get recommendation from committee or chapter member
  - Use IEEE distinguished speakers when you can, due to their status and experience
  
- **Location**
  - Find a facility that is centrally located and easy to get to for your target audience
  - Free corporate or university facility can save on expenses
  - Make sure parking is easy and cheap or free or can be validated

## Getting the Word Out

Your target audience must be clearly defined and notified

### ➤ Email

- Email is fast and easy but must be repeated and interesting to get attention
- People tend to gloss over emails.
- The title of the email is important to generate interest
- The body of the email should be concise. If additional information is needed, then a link to a web site is preferable
- Be careful of titles -- spam filters may block your delivery

### ➤ US Mail

Expensive, but may be effective as people like to get paper mail at work, gives them something to hang outside their cube or office without the hassle of printing an email

### ➤ Personal Announcements

- Urge coordinators of other technical meetings in similar disciplines (ASME, ACM, SPIE, etc) to advertise your meeting. It always helps to generate interest if a captive audience is notified of an event in their field—you will probably have to reciprocate
- Ask friends and colleagues to spread the word about your event in their workplaces

# Financial Details

- There are many aspects to consider when planning a conference or workshop
- Hidden costs and insufficient planning can make a great conference end up losing revenue, registrations or both
- Take the time to write down everything that will create revenue and to capture all expenses in the budget

# Financial Planning

- Plan
  - Spreadsheet is a good way to keep records for planning and reconciliation
  - Master Categories
    - Revenue
    - Expense
    - Cash Flow Timeline
    - Summary
      - Charts (optional)

# Revenue

- Estimate the attendance figures for the event
  - Include short courses, workshops and other paid events
- Types of Revenue
  - What is the right fee? Too high—scare potential attendees. Too Low—lose potential revenue
  - Regular and Late fee structures
    - Discount for IEEE members (~15%, varies)
    - Discount for full time students (~50%, varies)
  - Late registration should add ~25%

# Revenue

- Corporate Sponsorships
  - Coffee breaks or socials
    - Display sponsor logo or recognition (no ads)
    - Different levels for contributors to conference
      - May include special consideration for significant contributors
- Society Sponsorships
  - Share in profits or losses for conference
- Exhibits
  - Some events include floor space for vendor exhibits

# Expense

- Typical A/V Expenses
  - PC – laptop or desktop
  - Video or overhead projector
  - Microphones, laser pointers, timers
  - A/V technician
    - try to get student or volunteer support for this
- Atypical A/V Expenses
  - TV Monitor or VCR/DVD/CD
  - Phone or internet connection

# Expense

- Facility
  - Variable fees can be expected for rooms and services
    - Conference rooms can be part of a package deal that includes a block hotel reservation guarantee
    - May also be provided for guaranteed meal purchases, i.e. conference pays for attendee meal
      - This is more common for smaller symposiums and workshops

# Expense

- Instructor/speaker honorariums
- Printing costs
  - Event book/CD, handouts, call for next event papers, copies
- Publicity costs
- Refreshments / breaks
- Meals
- Receptions or special events
- Awards or gifts
- Committee meeting rooms

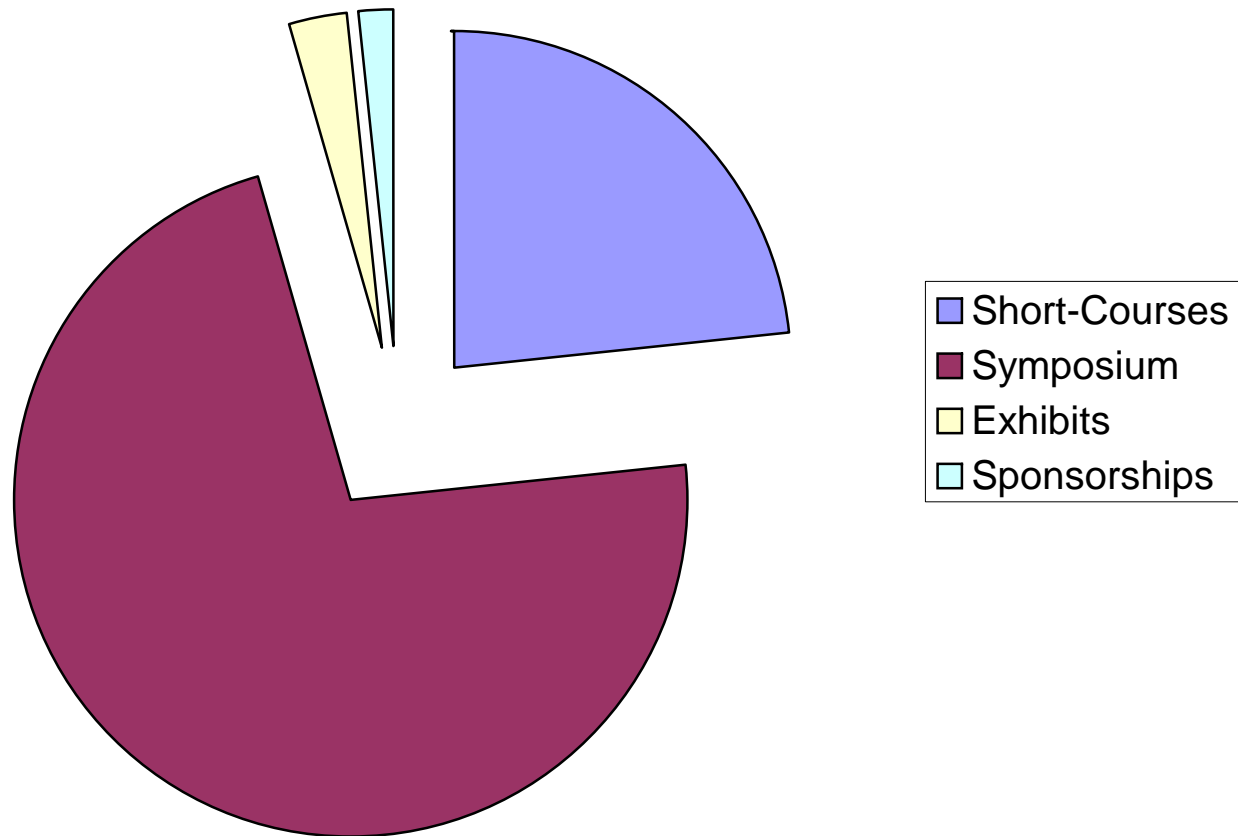
# Summaries

- Cash Flow
  - Keep a timeline for revenue and expenses
  - Make sure funds are in place when needed
  - Find when support from sponsors is needed
- Summary
  - Result from Revenue and Expense sheets
  - Show net surplus or deficit
- Charts
  - Visual elements help with overall evaluation

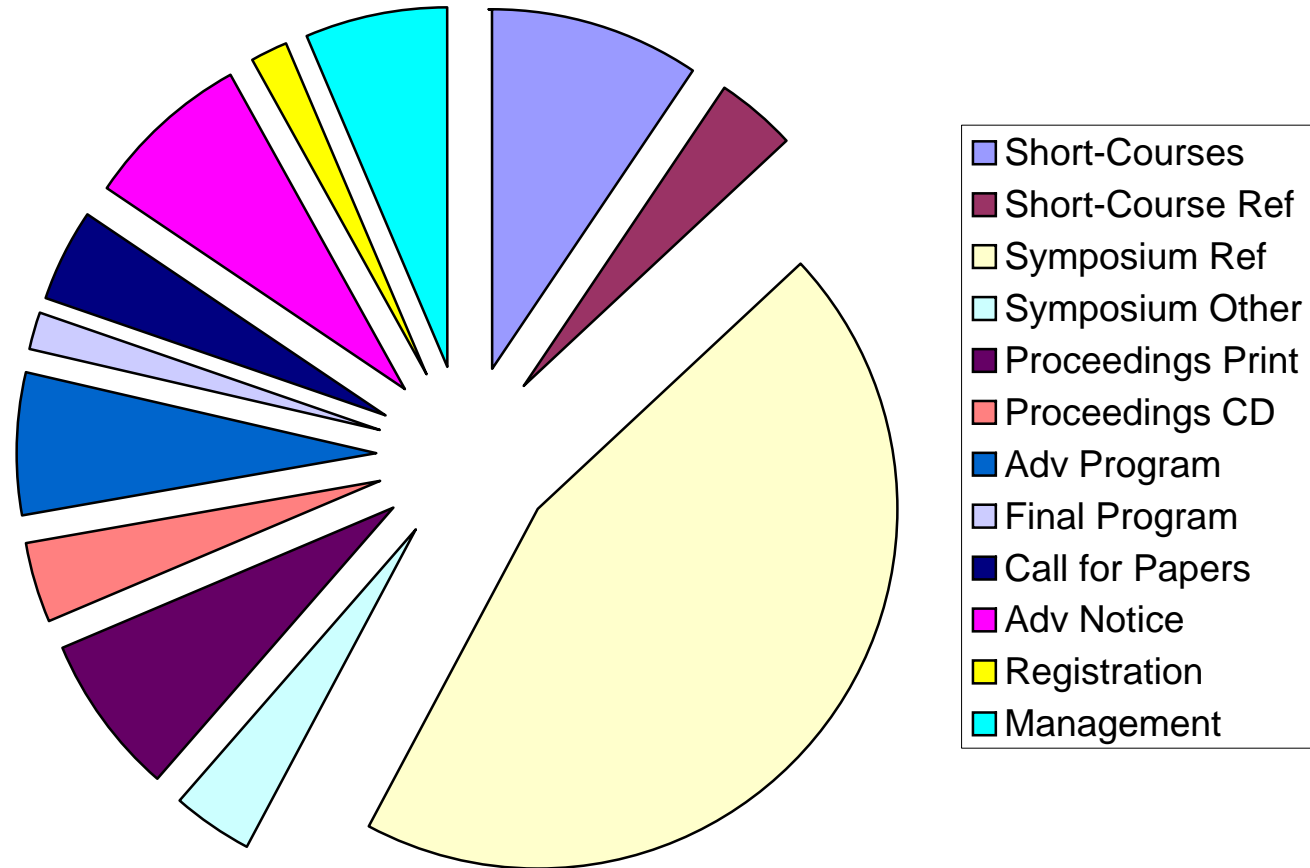
# Reconciliation

- Post-conference revenues and expenses are compared with budget estimations
  - Spreadsheet eases the process
- Close books and finalize finances with sponsors and debtors
- Start planning for next year!

### Revenue by Source



### Expenses by Type



### Surplus/(Deficit) by Month

