APPENDIX I

MISCELLANEOUS HINTS FOR RUNNING A CONFERENCE

A Remark:

Organizing a VLDB conference is a demanding task, and anyone underestimating this task will find himself in exasperation, frequently causing irritation and unhappiness to many people as well. Organizers should carefully consider this point before acceptance of responsibility. On the other hand, it is also a very rewarding professional and social experience to see a conference run successfully and its audience satisfied. This usually pays off all the hard work and anxiety during the course of developing and holding the conference.

A Golden Rule:

Be sure to communicate with the Endowment Executive Committee and with the officers of earlier Conferences and derive the benefits of unwritten experiences, do's and don'ts, contacts, sources of funds, etc., from past VLDBs.

Communication

Communication is one of the biggest problems in running a VLDB conference. Communication in itself can make or break the conference. It is critical. DO NOT underestimate the problem this can cause! Be sure to get this part straightened out early and have a good procedure to follow and a good understanding among the officers of the Conference and the members of the various committees. Much irritation can result from the mishandling of this problem. Always maintain an up-to-date list of conference leaders, addresses, telephones, telex, and computer network addresses.

Choice of Conference Date

Remember that you have only a limited time range of September 15 ± one month to choose the conference date from, and only a window from March to May for paper submission and processing. These dates have been chosen as a matter of coordination with other major database conferences. To minimize overlaps with regard to conference and/or submission dates, inquire early enough about the scheduled dates of major competing database conferences such as ACM SIGMOD, IEEE Data Engineering, ACM PODS, and EDBT. Also check for dates of the IFIP World Congresses, since the VLDB Endowment is an IFIP affiliate. Check with the respective organizations and societies. Also, once the date of your conference has been settled upon, be sure to communicate it to the aforementioned organizations. Collisions should be avoided because they cut into the submission of papers and participation.

Sponsorships, Support, and Cooperation

To gain maximal visibility to, and participation from, potential authors and attendees, the primary focus should be placed on professional society cooperation, such as ACM, IEEE, IFIP, and the various national computer societies in and around the host country. Furthermore, to broaden impact, cooperation should be actively sought from other influential societies, especially those that are closely related to applications and management of information and knowledge.

Three forms of cooperation are possible;

- Sponsors contribute significantly, financially or otherwise. Generally, sponsors are not-for-profit organizations. Not-for-profit sponsors may share profits if agreed beforehand. As a rule, the VLDB Endowment permits a maximum of 50% share to be offered in total to sponsors.
- Supporters support the conference in a lesser role, financial or otherwise.
- The term "in cooperation with" is to be used when a professional organization agrees to let the conference use its name but accepts no financial responsibility or liability.

Least critical is the "in cooperation with" association, because this maximizes the likelihood and speed of gaining approval. This kind of arrangement may still provide access to mailing lists and publications, sometimes even preferential advertising rates.

As indicated later on, cash-flow problems may be eased by entering into co-sponsorships. As it turns out, in the US, co-sponsorship with local societies (primarily ACM and IEEE) is not straightforward, mainly because they have their own conditions for accepting co-sponsorship. For example, filling in the application forms is tedious and time-consuming. Also, the societies often want to use their services for organizing the registration and for printing the proceedings even though commercial quotes usually are less expensive. In the past, the most difficult issue turned out to be the insurance requirements of ACM. The negotiations may drag on for months. At the minimum, one has to agree to have property and personnel liability insurance.

Experience has shown that it may be easiest to co-sponsor with just a single organization, usually a local computer society, because their insurance can then easily extend to the conference, and they may still be offered a 50% share of the surplus. However, make clear from the beginning that you reserve the right not to use their services if they are not cost-competitive.

As a trend, grants assume an important and ever-growing role in conference budgets, presently covering, on the average, about one third. Because grants seem critical to the financial viability of a conference, major attention should be devoted to acquiring additional sponsorships. Conference organizers are strongly advised to nominate a Sponsorship Correspondent, who is responsible for maintaining contacts with local sponsoring organizations, soliciting grants, and keeping continuous track of the flow and disbursement of grants.

Professional Organizers

Past Conferences have tried both to work on an all-volunteer basis and with professional organizers.

Professional organizers can be of considerable help, but even then considerable work is left to the (volunteer) organizers. On the other hand, hiring professional organizers is expensive. For full service, they charge about $40-45 (in 1990) figures) per attendee. the cost has to be added to the registration fees. Unfortunately, experiences in getting volunteer help has also been mixed. While people who volunteered were initially very helpful and enthusiastic, they soon were overwhelmed by the complexity and amount of work involved.

A suitable compromise looks as follows. Perform initial functions by volunteers. Once the more routine tasks, such as registration, coordination with the hotel, predominate — as they do during the latter portion of preparations — turn these over to a professional organization. Otherwise, there is too much to be learned in negotiating with hotels, airlines, printers, mailing houses — a process that is painful and very time-consuming. Volunteer help is difficult there because of all the other pressures they have. This compromise should raise costs by only $15-20 (1990 figures).

Conference organizers should spell out in detail what will be expected from the professional organization to avoid misunderstandings. For example, the active involvement of the organizing committee in handling the scientific program and details of the mailing may not be properly reflected in the price setting.

Publicity

Publicity is of critical importance to the success of the conference. It is essential that publicity materials reach people on time.

One publicity channel is mailing. There are at least two mailings: the Call for Papers and the Advance Program. There is one crucial point where timing is tight: the production and mailing of the Advance Program (AP). Typically, the program chair makes the final decisions on the content of the program about 4 months before the Conference. By the time all the material for the AP reaches the typesetter and is ready for print, 2-3 weeks are lost. Another 3-4 weeks may be needed for printing and mailing. Thus, if everything is on schedule, the AP should reach people about 2.5 to 3 months before the conference. That leaves no margins for errors.

Therefore, one may decide on a third mailing action of sending out a Call for Attendance, which includes information about travel, registration to the conference, and accommodation information. It should be targeted for mailing 4-5 months before the conference, i.e., before the program committees have met, and hence should reach people about 4 months before the conference. It is desirable to have the General Tutorials information included. Accordingly, General Tutorials should be decided at least 5 months before the conference.

The Final Program with up-to-date on session schedules and chairpersons and on panelists will usually be made available only as part of the registration kit, but may be the subject of a further more selective mailing.

Besides mailing, try to advertise in journals with high visibility, e.g., IEEE Computer, IEEE TKDE, CACM and Information Systems, also perhaps in the SIG publications in the various nations, e.g., ACM SIGMOD REcord, IEEE Data Engineering, Database (ACM SIFBDP) in the US. Advertising in journals is expensive: a full-page ad costs about $3,500. It is possible to squeeze enough information as well as a conference registration form into a half-page. Having ACM or IEEE Computer Society as sponsors or in cooperation can significantly reduce the ad costs. The SIGMOD Record will include a full page ad for free. All journals require 2-3 months before they can put an ad in.

Send out information periodically to the major professional journals and trade magazines, for inclusion in their Call for Papers and Calendar of Events sections, as well as for news features. Examples are: CACM, Database (ACM SIGBDP), IEEE Computer, IEEE Spectrum, Database Engineering, Electronic News, ComputerWorld, Datamation, OR/MS Today (TIMS), IFIP Newsletter, as well as the journals of the various national computer societies (e.g., Informatik-Spektrum in Germany, Computer Journal in the UK).

Other proven ways to advertise is to make publicity materials available at other conferences, to provide organizations that keep track of conferences and travels with up-to-date information about the conference, and to publish a VLDB'xx News Bulletin at regular intervals.

You may draw on the Endowment's corporate experience by closely cooperating with its Public Relations and Publicity Liaison. This official maintains contacts to ACM, IEEE, and other computer societies, is responsible for the promotional material of the Endowment, and provides the liaison to address lists and mailing services.

Mail

Even though mail is important, it must be carefully examined because it is one of the big expense items.

In the US, one should obtain a Non-Profit permit to allow one to mail at low rates. Obtaining a new non-profit mailing permit is a non-trivial problem. Getting a new permit requires proof of non-profit status. Awaiting approval would be a long and unpredictable process. To use this permit, mail must be sorted in a certain manner. Therefore, it is recommended to stay with the current arrangement in which actual mailing is done via permit from one station by Aames Mailing Service in Los Angeles. Note that Aames requires prepayment in order to become active.

Another headache is obtaining mailing lists. They may be obtained from various sources, but are of varying qualities, with overlaps; their clean-up requires large efforts. For North America, the VLDB mailing list is maintained by Scotally Enterprises in Los Angeles.

In other countries, as in Europe, Non-Profit permits do not exist, but other special rates may be used. At present (January 1991) mailing arrangements for Europe are being negotiated (contact the Executive Committee).

Another important channel is direct mailing through the regional coordinators who often may also be in a position to have their institutions cover the mailing costs. Note that the regional coordinators have not always been effective in the past and that considerable pressure must sometimes be exerted on them.

Advertisements are somewhat of a substitute for mailing. Be sure to include the address, phone, fax, and email numbers of key organizers in advertisements so interested parties that were not on the mailing list can turn to them. The key organizers should, therefore, keep a fair number of calls for attendance or advance programs on reserve.

Among the several mailings, such as call for papers, call for attendance, advanced program, mailing costs are much higher for the latter two because of their multi-page contents. They should, therefore, be used more discriminately.

Again, for all these issues, draw on the experience of the Endowment's Public Relations and Publicity Liaison.

Budgetary and Financial Matters

It is most useful, besides using the required forms, to look at the expense details of previous Conferences for planning purposes, and to talk to the respective organizers. It may be particularly helpful to use the fixed and variable cost method. Fixed costs are those that do not depend on the number of attendees, such as printing of publicity materials, mailing, rental of audio-visual equipment, etc. Variable costs are per attendee, such as proceedings, banquet costs, coffee breaks, and reception. For planning purposes, the registration fee may be calculated as follows: divide the fixed cost by the number of people for break-even, and add the variable cost per person.

Choosing the break-even point (in number of attendees) is a problem of risk versus fee. Local conditions should be taken into account, e.g., if the host country has a well-developed database community, the break-even point could be set higher than in other cases. Experience shows that the break-even point should be set accordingly and somewhere between 300 and 400.

Analyses of past attendance provide a number of clues. For example, VLDB usually attracts a kernel of about 300 people (this may vary depending on the current political climate and other factors such as ease of access). The success of the conference thus depends on generating sufficient interest over and above this kernel. For example, it has been observed that about 40% of the attendees come from the direct surroundings of the conference site, and another 40% from the same continent. This clearly shows where the emphasis in publicity should be placed. For planning purposes, attach a reply card to the Call for Papers to get an indication of the number of participants.

To keep a running estimate during the registration period, it has been observed that early registration results in about 40% of the attendees, that one month later 50% had registered, and a week before the Conference 80-90%. There is still a sizeable number to register at the conference.

One of the bigger headaches is cash flow. The loan that the VLDB Endowment provides is definitely not sufficient to cover costs until registration receipts start coming in. A matching sum should be obtained from the local co-sponsors, such as the local computer societies (for surplus sharing see above). Another contingent source of funds that helps cash flow is to approach industry supporters early. Indeed, this seems to be of critical importance.

Here is a list of miscellaneous money matters:

- Be sure to communicate to the main conference officers early in the development of the conference, the budgetary and subsidy do's and don'ts. What will be covered for program and organization committee meetings must be communicated; there is usually a budget entry to support travel to such meetings.
- Special attention should be paid to the handling of money matters when a host country has restrictions in moving money in and out of that country. In cases where there are restrictions, it is imperative that money should remain in a country (US is very appropriate) where no restriction exists, and organizers keep only what is needed to run the conference in the host country.
- Request postponement of especially large expense payments, to help alleviate cash flow problems. The bill for printing proceedings is particularly large and is most appropriate for this.
- Be sure to allocate funds for miscellaneous items such as gifts or dinners for volunteers. Usually these sums are small. However, if the conference is run with mostly volunteers, who are non-technical professionals, this fund can be sizable and should be budgeted accordingly.
- During conference time, many persons will register. This will happen in spite of the pre-registration. Some of the registrations will come in the form of cash, credit cards, or checks. The procedure is to handle the money during this time — particularly the morning when the conference opens — is very crucial to get things running smoothly. Plan this procedure carefully with the on-site registration staff, and assign responsibilities very explicitly.

Registration Fees

Special reduced registration fees should be granted only under very special circumstances, and are usually limited to student discounts. Sponsoring local societies will usually insist that their members be offered the lowest full-service registration fee available from the conference. Since VLDB makes it a policy not to offer any discounts other than the ones mentioned above, such a request usually can easily be granted. Going beyond this arrangement must be planned carefully so the reduced income does not cause any problems and jeopardize the financial soundness of the conference, and should at any rate be cleared with the VLDB Executive Committee. One arrangement practiced in the past towards a sponsor has been to count its financial support as an advance purchase of a corresponding number of registrations. This guarantees the Conference a number of additional attendees.

A fair policy when a person cancels after registration seems to be as follows: When a cancellation is made before the conference opens, deduct the cost of the proceedings plus postage plus a certain amount of handling fee, and return the rest. If cancellation is made at conference time, deduct all costs including social program before any refund. If the conference runs to deficit, no refund should be made when cancellation is made after the deadline for advance registration. Be sure to send a copy of the proceedings to the person who cancels,or who does not attend the conference, when fund is kept. Note that no refund should be made until the conference has been held, and financial matters become clear.

Conference Banquet

Including the cost of the banquet in the registration fee drives the fee up, even for those who would prefer to do without it. Charging for it separately may help and even make the conference affordable to some. On the other hand, participants may not get reimbursed for it by their institutions, or may not be able to deduct it from taxes if charged separately. So the banquet, which is considered a major event and a means for communication at the conference, may draw a smaller participation than otherwise. Both ways have been tried in the past, with no clear indication, one way or the other.

Cultural events may be combined with the banquet. Such an arrangement may attract organizations to sponsor part of the banquet.

Conference Site Arrangements

The conference has been held in the past in convention centres, hotels, and on university campuses. Holding a conference in a hotel has many advantages when the hotel is a suitable site, and when it makes concessions.

Indeed, it is a normal practice that hotels will make concessions to a conference when they are chosen as the conference hotels. Hotels have a great deal of flexibility in making these concessions, many of which are major. For example, a hotel may allow only a very nominal charge to provide conference equipment, give free meeting rooms to the committees, etc. In addition, hotels will give free rooms for every fixed number of rooms booked at a substantially reduced conference rate. This number is again flexible. They may also provide a room free of charge without depending on the number of rooms booked.

There is no hard and fast rule for what can be achieved in this respect. Be prepared to BARGAIN hard and talk to more than one hotel as long as that hotel is suitable for holding the conference. Be prepared to hold some social events in the hotel (like conference banquet and reception, for example). That may make them agree to your terms. The Organization Committee Chairperson must feel comfortable in doing this bargaining. He can get someone to help him, if he is not so confident. Be sure to know some statistics of past VLDB conferences — like number of attendees, and where and when they have been held. Hotels want to get assurance that things will happen as said to them. Past history is a good indication.

Be sure to get the hotel to agree to follow a certain procedure. Get written replies from their offers, even at a preliminary stage. Sometimes during the course of negotiation, hotels have personnel change. But they would still honour previous offers if substantiated.

The possibility of obtaining state or community sponsorship for convention centres or economical rental rates for university facilities should not be underestimated, and may lead to reduced costs for the conference site which may compensate for higher hotel outlays. Such alternatives should seriously be explored.

Technical Program

VLDB conferences are scientific conferences striving for the highest possible quality. The General Conference Chairperson and the Program Chairpersons, as well as the Program Committees, shoulder a heavy responsibility to achieve these aims. To aid them, a separate Guidelines and Recommendations for the VLDB Program Committees have been issued. Be sure to consult them well in advance. For tutorials, see also the VLDB Annual Conference Principles, Policies, and Guide-lines, main section.

A few items require early careful planning by the General Conference Chairperson and the Program Chairpersons. Usually very little time (only several weeks) is allocated to the Program Committees to process the submitted papers. This occurs because the schedule may be constrained by various events, and organizers cannot close the Call for Papers too early as it may then create conflict with other major conferences. It is therefore of utmost importance that a detailed plan to carry out this process is worked out.

Further, the heavy load to the Program Committee members is not expected by some of them. The PC members may accept the invitation and commit themselves too lightly. Program Chairpersons, when contacting potential members, should explain the requirements to them before they accept. Program Chairpersons should always keep in mind that they should not just go for "names", unless those persons commit seriously, and they should try to locate young researchers who are establishing themselves and are eager to work, and not only people they know well directly.

In planning for the conference site, early decisions may have to be taken whether to run two or three sessions in parallel, and also to decide when to run the General and Technical Tutorials. This, in turn, determines the number of papers to be accepted. Still, during a three-day conference, the total number of sessions available provides enough slack to accommodate a varying number of papers. At most, three sessions should be planned in parallel, including the panels and tutorials.

Committee Meetings

While many of the things can be done by correspondence or via a computer net, it will always require face-to-face meetings to get some issues settled, and get a thorough understanding. Organizers should keep in mind that committee meetings, at least with the key members present, are needed and should be planned at certain times that would allow critical issues to be discussed

and resolved. During the course of organizing the conference, more than one planning meeting is likely needed (not counting Program Committee meetings or final Program meetings). Consult the suggested schedule of events in Appendix II.

Proceedings Distribution

Except for on-site purchase, no distribution (by mail) should be done until after the conference. It is confusing and causes more headache. Let the Endowment handle this part. It is one of its responsibilities.

Travel

Travel Grants

Travel grants to attendees should be given only after the individual has attended the conference. This should occur even when the money for travel support is there to be disbursed. Commitments, however, should be made as early as possible to encorage people to participate.

Distribution of travel grants must be carefully done according to the constraints of the donating organizations. The Area Chairpersons should have a strong say about the distribution of the funds they have obtained.

Free Travel from Airlines

Airlines sometimes provide conference free travel to the conference site when they can expect some business from the conference. This is very useful when an organizer must go to the conference site to meet or see the conference facility. If you do not know how to take advantage of this, enlist the help of the travel agency whom you have identified as the travel organizer. This work is particularly fruitful when the host country's airline is approached and it is promised to be the conference carrier.

This is in addition to free seats that airlines often provide when enough seats are booked as a group. Group travel, in the loose sense, can be organized with the aid of the travel agencies. What one can get from this depends on the negotiation skill of the conference organizers, the airlines and the travel agencies.

Emergency Travel Support

Traditionally, the organizers of a VLDB conference have obtained travel support funds to provide assistance to conference participants, especially authors, who are unable to get sufficient travel funds from their institutions or other sources. This seems to become harder every year. Therefore, start your efforts early. Rely on Area Chairman and national representatives (name some for that purpose).

Travel agencies

Travel commitments are exclusively between travel agent and the individual participant. If the Conference organizers solicit the aid of travel agencies and, as a consequence, include their names in the various calls for participation, a waiver of responsibility should explicitly be stated.