

Geo-Institute Guidance for Organizing Events

**Prepared by Conferences and Events Committee
of the Geo-Institute**

Table of Contents

A. Introduction.....	1
B. Policies for Events.....	2
B.1. G-I Objectives for Events.....	2
B.2. Coordination of Events.....	2
B.3. Type of Events	3
B.4. Frequencies of Events	4
B.5. Cooperation with ASCE.....	4
C. Guidelines for Organizers	6
C.1. Types of Activities	6
C.2. Organizing Committee	7
C.3. Venue	8
C.4. Administration.....	8
C.5. Exhibits.....	8
C.6. Schedule	8
C.7. Publications	9
C.8. Budgets.....	10
C.9. Sponsorship	12
D. Procedures for Organizing Events	14
D.1. Proposal Preparation and Evaluation	14
D.1.1. Proposal Preparation	14
D.1.2. Proposal Evaluations.....	14
D.2. Progress Reports	16
D.3. Development of Co-Sponsorship Agreements.....	16
D.3.1. Definitions.....	16
D.3.2. Solicitations from Other Organizations to the G-I.....	17
D.3.2.1. General Discussion	17
D.3.2.2. Evaluation Criteria	17
D.3.2.3. Considerations in Forming and Agreement as Co-Organizer	18
D.3.3. Solicitation from the G-I to Other Organizations	19
D.3.3.1. Requests to Prospective Cooperating Organizations	19
D.3.3.2. Sample Forms for Solicitation	19
D.4. Administration	19
D.5. Event Evaluation and Report	20
D.5.1. Performance Evaluation.....	20
D.5.2. Post-Event Report	20

Appendices

Appendix A – Proposal Form

Appendix B.1 – Schedule Template

Appendix B.2 – Example Conference Schedule

Appendix C.1 – Budget Template

Appendix C.2 – Example Denver Budget

Appendix C.3 – Example Illinois Budget

Appendix D – CEC Proposal Evaluation Form

Appendix E – Progress Report Form

Appendix F.1 – Evaluation Form for G-I Co-Sponsorship

Appendix F.2 – Information Sheet for Cooperating Organizations

Appendix F.3 – Response Form for Cooperating Organizations

Appendix G – Example Agreement for Management

Appendix H.1 – Attendee Evaluation Form

Appendix H.2 – Exhibitor Evaluation Form

A. Introduction

This document provides guidance for developing, organizing and evaluating Geo-Institute (G-I) Events. G-I Events include conferences, workshops and other meetings. Events are the primary means by which the mission of the G-I is accomplished. This document is intended to give Event organizers the necessary support to put on valuable and profitable Events that are of a high quality consistent with G-I standards.

The Conferences and Events Committee of the G-I developed this document. It is a living document that is updated frequently; the date in the upper right hand corner of each page indicates the version of the document.

To supplement this document, historical information for conferences (including budgets, schedules, proposals and final reports) is archived by the G-I and can be accessed electronically. A current list of the available information is located on the G-I Web Site: www.geoinstitute.org.

B. Policies for Events

Current policies for G-I events are provided below. These policies include (1) G-I objectives for Events; (2) how Events are coordinated within the G-I; (3) the types of Events that can be held; (4) the frequencies for major Events; and (5) how cooperation with ASCE is accomplished.

B.1. G-I Objectives for Events

1. Add Value to G-I Members
 - a) Expand Membership (numbers and types)
 - b) Generate Enthusiasm
 - c) Increase Member Participation
2. Provide High Quality
 - a) Use Attractive Venues (location and time of year)
 - b) Draw High-Profile Participants (high regard by attendees)
 - c) Address Appealing Topics (varied and interesting)
 - d) Provide Valuable Activities (varied and inclusive of G-I technical committees)
3. Return Surplus to the G-I
 - a) Target Revenue Surplus of 10% per Event
 - b) Set Break-Even Attendance for Annual Specialty Conferences to More than 300

B.2. Coordination of Events

Coordination of G-I Events is the responsibility of the Conferences and Events Committee (CEC). The CEC is one of nine standing committees of the G-I Board of Governors (BoG). The other eight committees are Awards, Codes and Standards, Public Relations, Membership, Nominations and Elections, Technical Publications, Sections and Branches, and Technical Coordinating Council (TCC).

The CEC is charged with overseeing and guiding the planning for individual Events. The CEC has the following specific responsibilities:

- review proposals for Events and provide input to the TCC about the quality of the proposal;
- approve the organizing committee;
- review, approve and track budgets;
- review, approve and track schedules;
- review and implement co-sponsorship agreements;
- review and implement agreements with conference administrators; and
- review and approve post-event evaluation reports.

The TCC works closely with the CEC. The TCC is charged with coordinating all technical activities of the G-I, which includes establishing and implementing policies about types, frequencies and co-sponsorship of Events. The TCC has the following responsibilities:

- solicit and approve proposals for Events, thereby managing the types and frequencies of G-I Events; and
- solicit and encourage co-sponsorship arrangements.

The G-I Staff is directly involved in the activities of both the CEC and the TCC. All legal agreements between the G-I and ASCE conference managers, external conference managers, co-sponsors, facilities and vendors are negotiated and approved by G-I Staff. In addition, the G-I Staff maintains the archive of historical information on conferences.

B.3. Types of Events

The types of Events that the G-I holds include, but are not limited to, the following:

Congresses – Congresses are intended to be broad in scope, have large exhibits, and be three full days in length with pre- and post-cursor events including short courses, workshops, and field trips. There should be tremendous variety in session formats, including keynotes, panels, technical papers, synthesized Manual-of-Practice (MOP) sessions, demonstrations (especially field activities, as at Geo-Logan in 1997), facilitated discussions, State-of-Practice (SOP) organizing meetings, and SOP presentation sessions. At least one or more publications should be produced, including Geotechnical Specialty Publications (GSPs), MOP documents, and workshop documents. The targeted attendance should be 800 to 1,000 registrants. Congresses should usually be organized with co-sponsors, including both Cooperating Organizations and possibly Co-Organizers (see Section D.3).

Specialty Conferences – Specialty Conferences are intended to be focused on specific technical topics, have small exhibits, be two to three full days in length, and have pre- and post-cursor activities specifically tied into the specialty conference topic. A GSP should be produced that includes all papers and keynotes. The papers should be reviewed per normal high-quality procedures to produce a respected refereed document. Specialty Conferences may be organized with co-sponsors.

Mini-Conferences at ASCE National Conventions – Mini-Conferences at ASCE National Conventions should be organized to take advantage of the full scope of civil engineering expertise being present. They should consist of five technical sessions at a minimum, and generally no more than 20 technical sessions. They should generally be organized in partnerships with other ASCE institutes and divisions. Local section and branch activities should be incorporated into the planning. Local civil engineering projects should be utilized as highlights and/or foci. A GSP should be produced. Currently a profit-sharing agreement must be negotiated with ASCE on an annual basis, however it is recommended that a general profit-sharing agreement with ASCE be established (see Section D.4).

Technical Workshops – Technical Workshops are intended to be focused on a specific technical topic and to have significant opportunity for dialog and discussion amongst the participants. They can be developed as pre- or post-cursor events to congresses and conferences or they can be held separately. A document summarizing the workshop proceedings should be produced. Technical Workshops should generally be organized by a technical committee or task force of the G-I and possibly in co-sponsorship by another organization.

Short Courses – Short Courses are intended to provide continuing education services for the G-I membership. Technical committees and task forces may develop them, or they may be invited in from other organizations. Short Courses will usually be arranged as pre- or post-conference activities, but they may be offered as stand-alone scheduled courses (e.g., through the G-I continuing education organization). Short Courses may be offered more than once, and may be offered to other organizations at G-I co-sponsored events. A document of course notes should generally be produced for course participants and for marketing purposes.

Road Show Events – Road Show Events are specially organized short courses, workshops or SOP workshops on topics of high interest that are intended to be "booked" out to ASCE Sections and Branches. They may be developed by a technical committee or task force, by a SOP organizing group, or by a Section or Branch that wants to "take its own show on the road." The developers may consist of a tag team of six to ten people who will be prepared to participate in the offering at different locations depending on scheduling. These events should typically be one to two days in length, and may be offered over weekends so practitioners can take advantage. Profits should be shared among the developers, the Section or Branch, and the G-I.

B.4. Frequencies of Events

The appropriate frequency of events depends strongly on the size and activity level of the G-I. Given current conditions, the following schedule for major Events is typical:

- A Congress once every two years;
- A Specialty Conference once per year; and
- Annual Participation with a Mini-Conference in the ASCE National Convention.

Short-term growth of the G-I can be accommodated by increasing co-sponsorship with other organizations and by increasing the number of stand-alone workshops.

B.5. Cooperation with ASCE

Cooperation with ASCE in organizing Events is encouraged. Specifically, the following policies are recommended:

- Invite and provide complimentary registrations to the Executive Director, President and President-Elect of ASCE for all G-I congresses and conferences; and
- Consider first the use of ASCE versus outside organizations to administer G-I congresses and conferences and publish proceedings; and
- Seek cooperation with Sections, Branches and other local units of ASCE.

ASCE has the right of first refusal on the provision of products (such as publications) and certain services (such as conference management) to the G-I. The term "right of first refusal" means that for any project, program, or other activity that the G-I wishes to pursue and which requires the provision of services or products, the G-I agrees to make a request to conduct the activity with, and obtain the products and services from ASCE. ASCE agrees to consider the request, consult with the G-I, and respond to the request in writing, within 30 days. If ASCE declines or fails to respond, the G-I is free to proceed with an outside source. If ASCE is unable or unwilling to furnish the products and services and/or is otherwise unable or unwilling to furnish

the products and services at costs and/or quality commensurate with those products and services that may be obtained from outside sources, then negotiations shall take place between the G-I and ASCE and if there are issues which cannot be resolved, they will be referred to a conflict resolution process.

C. Guidelines for Organizers

Guidelines are provided below for the individuals and groups who are planning and organizing a G-I Event. The following topics are addressed: types of activities, organizing committee, venue, administration, exhibits, schedule, publications, budget, and sponsorship. These guidelines are intentionally presented in a conversational tone in contrast to formal policies or procedures.

C.1. Types of Activities

Event planners are encouraged to include a well-chosen variety of activities that engender excitement: some can be single sessions and some may be a sequence of sculpted sessions that develop a focus area in greater thoroughness. Such events might include:

- Keynote sessions (plenary, invited - extremely important for success of a conference)

- Demonstrations

 - lab

 - computer

 - field

- Panel discussions

- Posters (perhaps open for individual visiting (with a map of poster/booth layout) during a reception)

- Reported sessions (papers abstracted and reported on by the reporter/chair, with the rest of the session perhaps with authors as panelists with brief opening statements and then discussion among authors and open to audience)

- Sessions with keynote papers as lead (invited) followed by topical papers identified through a "call" and incorporating discussion led by moderator and/or keynoter

- Debates

- Case history sessions - with facilitated discussions

- New technology and materials sessions - variety of formats including demonstrations

- Sessions on special presentations of G-I (or co-sponsor) publications - including MOPs (Manuals of Practice) and SOP (State-of-Practice) guidelines

- Creative sessions (e.g., "Geomagic")

- Invited student papers

- Funding agency discussions (perhaps including USGS, FHWA, military research arms, NSF, maybe invite DARPA, EPRI and other industry organizations)

- Events involving competitions

 - e.g., performance predictions, comparative analyses

- Sessions invited from co-sponsoring organizations (e.g., ASFE's sessions on professional issues at Logan, engineering geophysics sessions from EEGS)

- Special topic sessions:

 - Education in Geotechnical Engineering

 - Diversity issues (may include a reception with diversity as its focus)

- Perhaps a sponsored session (e.g. NSF or FHWA) with reports on research in progress, geared toward industry interaction in the research and eventual technology transfer into practice

- Award-winning Geo-industry applications

- Geo-news - sessions framed around short hot-off-the-press developments in geotechnical and geo-environmental engineering

Session focusing on international developments

Session focusing on professional practice

Pre- and Post-conference activities:

Workshops and Short Courses (new technology, methodology, design approaches,)

G-I committee generated

Section/Branch generated

Co-sponsor generated

Solicited (e.g. from co-sponsors, FHWA, elsewhere in ASCE, etc.)

Proposal writing (e.g. NSF put one on at Illinois in 1999)

Local flavor

Field trips:

Geotechnical local practice/projects

Area geology

C.2. Organizing Committee

The following six people should make up a committee for a congress or conference:

- Chair - responsible for overall management.
- Editor - takes care of the GSP and the program.
- Exhibits Manager - arranges for exhibits.
- Reality Checker - someone who has done this successfully before and will give you frank comments (e.g., somebody like Bill Marcuson)
- Facilities and Auxiliary Programs - handles the building and spouse activities. Should be local.
- CEC Contact - appointed by CEC, but should be a strong supporter and helper.

In addition, the following should be considered in forming the committee:

- The local ASCE Branch or Section should be represented on the committee;
- Inclusion of a Co-chair has several potential advantages. First, it reduces the load on a single person by dividing up overall management into one person responsible for the program and the other responsible for administration. Second, it provides redundancy in communication (e.g., if the chair is out of town and cannot be reached).
- If special activities are planned, such as a field demonstration or a large number of workshops and short courses, then a person responsible for these activities may be warranted.
- The committee should be diverse.

A good rule of thumb for organizing committees is "smaller is better." As the committee becomes larger, meetings become more difficult to schedule and decisions become more difficult to make.

Smaller Events, such as workshops, may be organized by smaller groups or even a single person.

C.3. Venue

The most important considerations in the venue for an Event are (1) the quality and capacity of the facilities and (2) the location and cost of the venue regarding travel. Successful Events have been held both in hotels and on university campuses, and both in large cities (e.g., San Francisco) and in smaller cities (e.g., Logan, Utah).

C.4. Administration

ASCE has first right of refusal for administration of G-I conferences and up to one month after receiving the formal proposal to make this decision. If ASCE elects to administer a conference, it assumes the financial risk and the G-I staff will negotiate a profit sharing arrangement with ASCE. If ASCE declines to administer a G-I conference, the organizing committee needs to make arrangements with a local conference center for the administration services and the G-I will assume the financial risk (and reward) for the conference. Normally ASCE elects not to administer conferences on university campuses and conferences with less than about 300 attendees.

Administration for workshops and short courses is the responsibility of the organizing committee. For example, the committee itself could administer the Event or the committee could arrange for administration services from an outside organization (including these costs in the budget).

C.5. Exhibits

Exhibitors can be a key item for a successful conference. They provide a venue where attendees can gather and mix in an informal social atmosphere. For example, some exhibitors provide hospitality suites where attendees can eat and drink. The Industrial Fabrics Association's "Geosynthetics" conferences provide a good example of how exhibits can bolster attendance and make the conference more fun.

One person on the organizing committee should be responsible for exhibits (the exhibits chair). Ideally this person should be a practitioner who will value exhibits. The conference administrator (ASCE, University extension, ExpoMasters, etc.) should have a person on staff who has expertise in selling exhibit space and negotiating exhibit contracts/services. Administrators who do not have such a person on staff should not be running a G-I conference.

A key factor that attracts exhibitors is their potential payoff. Who will purchase their products and/or services? Academicians probably will not, but practitioners and contractors will make purchases. Thus, the conference organizer and the G-I should do whatever is possible to improve attendance of practitioners and contractors. Their attendance is the key to the successful conferences of other organizations, such as IFAI and NGWA. Sessions should be organized with the practitioner in mind, and practical, inexpensive short courses should be offered.

C.6. Schedule

The important milestones in the planning of any event include the following:

- Develop congress/conference concept and prepare proposal

- Finalize management and co-sponsorship agreements
- Organize committee and assign tasks/roles
- Settle on location, sign facilities contract
- Begin marketing
- Publish preliminary technical program
- Publish final technical program
- Submit material to publisher
- Do it
- Prepare and submit final report

The following table provides guidance on the location of these milestones for typical Events.

Guidance for Event Schedule

Milestone	Congress or Specialty Conference (months)	Mini-Conferences at ASCE National Conventions (months)	Technical Workshops (months)	Short Courses (months)
Develop congress/conference concept and prepare proposal	-42	-36	-24	-24
Finalize management and co-sponsorship agreements	-30	Not Applicable	-21	-21
Organize committee and assign tasks/roles	-28	-24	-18	-18
Settle on location, sign facilities contract	-26	Not Applicable	-12	-12
Begin marketing	-24	-18	-8	-8
Publish preliminary technical program	-12	-12	-8	-8
Publish final technical program	-6	-6	-4	-4
Submit material to publisher	-3	-3	-3	-3
Do it	0	0	0	0
Prepare and submit final report	+4	+4	+2	+2

C.7. Publications

Publications have an extremely important role in G-I conferences and workshops for the following reasons:

- Publications provide a reason for people to attend; i.e., people attend because they prepared a paper and want to present it. Many companies are far more willing to send staff to conferences if they have prepared and are presenting a paper.
- Publications provide attendees with something valuable they can take back from the conference and share with their colleagues. A great talk with useful information lacks value if the attendees do not have a copy they can take back to the office. A good example was provided by one of the speakers at the ASCE National Convention held in Minneapolis, Minnesota. The speaker provided some terrific practical information but

no paper. As a result, attendees had no source to recall and begin using the information he presented. Many attendees were disappointed.

- Geotechnical engineers like publications. They like to write and read papers.
- Publications provide a continuing source of revenue for the G-I after the conference is over

Official conference proceedings from conferences should be prepared as Geotechnical Special Publications (GSPs) that are peer-reviewed. Guidelines are included in the *G-I Guide for Preparation of Geotechnical Special Publications*. The most important step in preparing a quality GSP is selecting the editor, who will be a member of the organizing committee. The editor should *not* be the conference chair. The chair has too much to do and editing is a large commitment. The editor *must* also have all of the following attributes: (1) publishing experience, (2) editorial and/or reviewing experience, (3) high technical standards, (4) practicality, (5) timeliness, (6) dependability, and (7) a secretary or assistant that can help. Do not pick an editor because they are a friend or a colleague. Pick someone that can be depended on to do a high quality job on time.

The editor and conference chair should draft the initial call for papers or develop a list of invited writers/presenters. The call or list must be carefully crafted to attract participants who will prepare interesting papers and to maintain a clear theme for the conference. The editor should collect the abstracts and collate them into topical areas. A meeting of the conference steering committee should then be held to select suitable abstracts.

All of the papers should be sent to the editor, who will coordinate reviews. If a large number of papers are expected the editor should appoint two or three co-editors to provide assistance. The co-editors should meet most of the criteria for editor, the most important being a reputation for quality and dependability. The editors then distribute the papers for review and ultimately compile the papers for publication.

The editor and conference chair should draft a tentative program once the abstracts have been selected, and revise this program as the papers are reviewed and the final manuscripts are completed. One other person on the organizing committee should assist in this task to provide some fresh eyes on the content. The GSP should be organized around the program used for the conference.

Short course or workshop notes are another form of publication that may be prepared. There are no review procedures for short course notes. However, one member of the short course team should be assigned responsibility for the notes. This person should review the notes for completeness and accuracy before they are printed and bound. All notes should include a reference list.

C.8. Budgets

There is greater flexibility in the budget for a G-I Event compared to an ASCE Event. For example, ASCE has strict policies about who can and cannot be offered complimentary registrations. However, complimentary registrations can be offered to any participant of a G-I Event (including organizers and speakers), providing that these items are included in the budget and the budget is approved.

The following is a list of general items to consider for inclusion in a budget:

- 10% Development Fee to G-I (required)
- Surplus for G-I, Organizers and Co-Organizers
- Revenue
 - Registration fees
 - Exhibitors
 - Proceedings sales
 - Guest tours
 - Corporate donations, gifts and grants (firm commitments required)
 - Cash advance from G-I or Co-Organizers
- Marketing
 - Brochures and preliminary programs
 - Mailings
 - Paid advertising
- Publications
 - Proceedings
 - Final program
- Facilities and Equipment Rental
 - Meeting space
 - Exhibit space
 - Demonstration space
 - A/V Equipment
 - Supplies
- Catering and Special Events
 - Meals
 - Refreshments
 - Local travel
- Conference Housing
- Conference Materials
 - Registration packets
 - Badges
- Conference Administration
- Complimentary Registrations
- Complimentary Travel and Lodging

In addition, the following recommendations are provided to reduce Event costs to the G-I:

- Secure Co-Organizers (including other non-profit organizations such as IFAI, private industries, and governmental agencies such as DOE, EPA, FHWA or NSF to share in costs and profits);
- Secure Cooperating Organizations to provide complimentary promotion;
- Solicit organizations to sponsor specific activities at the conference. For example, a local ASCE Section or Branch may wish to sponsor a breakfast.
- Investigate arrangements with hotels to reduce meeting room costs in return for guest room guarantees; and

- Use volunteers, such as members of local ASCE student chapters.

It is recommended that budgets and actual expenditures from past Events be used as guidance in preparing a budget. Unit costs will typically vary, according to the geographic area, number of attendees, and venue (e.g., hotel versus university campus). Examples of detailed budgets from past G-I conferences are available from the G-I web site or staff.

C.9. Sponsorship

There are many different options concerning how an Event is sponsored. Examples include the following:

- 1) G-I organized and managed
full profits to G-I.
- 2) G-I management with co-sponsorship by Cooperating Organizations
full profits to G-I
G-I develops and markets publications
co-sponsors:
 - receive reduced registration
 - provide advertising at no charge in organization publications
 - provide mailing lists at no charge
- 3) G-I management with Co-Organizer participation
full profits of meeting to G-I
G-I develops and markets meeting publications
profit sharing on special events (e.g., workshop, mini-symposia by other organizations)
co-sponsors:
 - members receive reduced registration
 - provide advertising at no charge in organization publications
 - provide mailing lists at no charge
 - shared publications from special events (both G-I and others can market)
- 4) G-I co-management with Co-Organizers
profit sharing
shared publications (both G-I and others can market)
mailing and organizing performed and costs paid by each organization
- 5) Co-Organizer management with G-I participation
no profit share on meeting to G-I
profit sharing to G-I on G-I special events (e.g., workshop or mini-symposia)
G-I can market special event publications
G-I actions:
 - members receive reduced registration at meeting and special event
 - provide publicity at no charge in G-I publications and web site
 - provide mailing lists at cost or no charge (dependent on profit-sharing scheme)
- 6) Outside management with G-I cooperation

no profit share to G-I

G-I actions:

- members receive reduced registration

- provide publicity at no charge in organization publications

- provide mailing lists at cost

D. Procedures for Organizing Events

The following section provides procedures for organizing a G-I Event. Procedures are provided for proposal preparation and evaluation, budget approval and tracking, development of co-sponsorship agreements, administration, and post-event evaluation and reporting.

D.1. Proposal Preparation and Evaluation

Proposals for Events will generally be prepared in response to a solicitation (either formal or informal) from the Technical Coordination Council (TCC). However, unsolicited proposals will also be accepted. The proposals will then be evaluated by the Conferences and Events Committee (CEC) and approved or rejected by the TCC based on the input of the CEC. The following sections describe how proposals should be prepared and how they will be evaluated.

D.1.1. Proposal Preparation

The following steps should be taken before preparing and submitting a proposal:

1. Contact the TCC to discuss your plans and to find out how your plans fit into their plans;
2. Read this document;
3. Read available information (on the Web Site or from staff) for similar, recent G-I Events.
4. Contact organizers from similar G-I Events in recent years; and
5. Prepare a formal proposal using the “**G-I Conference and Event Proposal Form**” that is attached to this document as Appendix A, and submit the completed form to the TCC. This proposal must include a preliminary schedule (see Appendix B.1 for the worksheet and Appendix B.2 for an example) and a preliminary budget (see Appendix C.1 for the worksheet and Appendices C.2 and C.3 for examples).

D.1.2. Proposal Evaluation

The Technical Coordinating Council (TCC) will forward all received proposals to the CEC. The CEC will consider the following questions in evaluating proposals. Factors are listed in order of importance.

- **Activities and Products**
 - What types of activities are planned and why?
 - What products such as publications will be produced?
- **Budget**
 - How feasible is the proposed budget?
 - How many attendees are needed to make the Event successful?
 - How much of a surplus is estimated?
 - What amount of money, if any, will be needed for initial organizing committee expenses?
 - What is the target registration cost?
 - What will a typical hotel room cost per night?

- What are typical roundtrip airfares (both weekday and weekend) from major cities (New York, Atlanta, Chicago, Denver, Los Angeles and Dallas)?
- What is the target profile of the typical attendee (e.g., contractor, consultant, academic, government)?
- How many and what types of exhibitors are expected?
- **Organizing Committee Chair**
 - Why does the chair feel the proposed conference has the potential to be an outstanding G-I conference?
 - What is the chair's level of commitment to see the conference through from the proposal to the completion of the Post-Event Report?
 - How much of his or her time (total hours) does the chair estimate will be required for conference organization activities and what provisions will be made to make this time available?
 - Who is the back-up person that the chair can rely on in case he/she is unable to carry out a responsibility?
 - What level of staff support does the chair have? Or will he/she be applying to the G-I for such support?
- **Organizing Committee**
 - Who are the key 3 to 5 people on the committee who will be willing to "get their hands dirty"?
 - What is the organizing experience of each of these persons?
 - What other organizations do any of these people bring to the table?
- **Venue**
 - How was the site chosen?
 - How is travel to/from the site facilitated?
 - What do peers said about the site?
 - How was the date for the Event chosen?
- **Schedule**
 - Is the schedule reasonable?
 - Will marketing be possible early enough to be effective?
- **Co-Organizing Partners**
 - What other organizations will be represented on the organizing committee?
 - What level of discussions have occurred with decision-makers of these organizations?
 - How will expenses or profits be shared with co-organizing partners?
 - What are the expectations for attendees, papers, sessions and exhibits contributed by each co-organizing partner?

- **Cooperating Organizations**
 - What other organizations will contribute to promoting the Event?
 - What are the expectations for these organizations?

- **Track Record of Similar Events**
 - What do the data from the previous Events indicate about the likely number of attendees?
 - Expenses?
 - Income?
 - Exhibitors?

- **Administration**
 - What are the preliminary recommendations regarding the administration of the Event?

The evaluation by the CEC will be completed on the “**CEC Proposal Evaluation Form**” that is attached as Appendix D to this document, and will then be returned to the TCC for action. The TCC may then choose to approve the proposal, reject the proposal, or request that the proposal be modified and re-submitted. The TCC will then send a letter to the proposer (copying the CEC and the G-I BoG) indicating what action has been taken, within 4 months of receiving the proposal. The CEC evaluation form will be attached to this letter.

D.2. Progress Reports

Once a proposal has been approved, progress reports must be submitted to the CEC so that they can track and guide the planning. These reports will be required quarterly until six months before the Event, and monthly thereafter. The schedule should include the schedule for these reports and describe the deliverables that will be attached to each report (e.g., see Appendix B.2).

The reports should be made using the “**Progress Report Form**” that is attached to this document as Appendix E. Each submittal will require that an updated schedule and an updated budget be attached, using the same forms used in the proposal (Appendix B.1 for the schedule and Appendix C.1 for the budget).

D.3. Development of Co-Sponsorship Agreements

D.3.1. Definitions

In general, the concept of co-sponsorship of conferences, meetings, or other such events means that two or more organizations will in some way be involved together in putting on an event. However, the specific authorities and responsibilities associated with being a co-sponsor can vary widely depending on the agreements established by the organizers of the event. The following two levels of co-sponsorship are defined to clarify the consideration and evaluation of co-sponsored events involving the Geo Institute:

Cooperating Organization. The definition of a Cooperating Organization is one that would announce support for an event, but would have no direct financial commitments. A cooperating organization would generally not have any responsibility or authority related to organizing or planning of the event.

Co-Organizer. A Co-Organizer would have input into the event organization and planning, and may or may not have financial commitments. The level of involvement may be anywhere from a 50/50 split of all responsibilities, to a very specific and narrowly focused sub-event to be administered by an organization within the context of the overall event. Given the wide variety of possibilities, Co-Organizer commitments will require negotiations between the organizations on a case-by-case basis.

D.3.2. Solicitations from Other Organizations to the G-I

D.3.2.1. General Discussion

The G-I is frequently requested to co-sponsor a conference, meeting, or other such event hosted by another organization. To allow proper evaluation of such requests, the requesting organization should provide, at a minimum, the information listed below. If their information is incomplete, a copy of this page could be sent to them as a prompt for a more complete request.

Minimum information to be provided by requesting organization:

- Mission statement of requesting organization.
- Title, date, and location of event.
- Mission statement, theme, or goal of event.
- Number and types of presentations, workshops, special speakers, etc.
- Expected number and profile of attendees.
- Anticipated registration cost.
- What commitments are being requested of the G-I?
- What benefits will the G-I receive?

Suggested procedures for evaluating these requests are outlined below.

D.3.2.2. Evaluation Criteria

The following criteria are suggested when evaluating a request to be a co-sponsor of another organization's event:

1. Value to G-I Members: Is the other organization's event of potential interest and value to the spectrum of G-I members?
2. Quality: Does the management and organization of the other event reflect the standards of the G-I?
3. Value to G-I Organization: Is the other organization's size, membership, exposure and recognition of G-I, and complimentary offerings of value to the G-I membership/sales goals?
4. Reciprocal Option: Is the other organization potentially valuable to have as a Cooperating Organization for G-I events?
5. Cost: Estimate the cost, if any, associated with the commitments requested of the G-I by the other organization. If the G-I is only being requested to be a cooperating organization, the cost should

not be more than complimentary publication in a Calendar of Events, and production of a mailing list. If the G-I is being requested to be a Co-Organizer, then the negotiation considerations discussed in the next section should be reviewed.

An evaluation form is presented in Appendix F.1. This page can be filled out by hand, or similar information typed and distributed to other G-I members as deemed appropriate. A decision will typically be made by communication between members of the CEC.

Written feedback to the requesting organization should be provided in a timely manner by the G-I member responsible for managing the request.

D.3.2.3. Considerations in Forming an Agreement as Co-Organizer

There are many creative instances where the G-I may wish to consider being a Co-Organizer of an event. Examples may range from the G-I allowing other organizations to hold special events within a G-I event, to a 50/50 organization of a specialty conference, to the G-I wishing to hold special small events or short courses within the context of another organization's main event. When the G-I is considering involvement as a co-organizer, an agreement should be signed by officers of the two organizations. Given the varied and technical nature of the profession, the agreements will be unique to each event, and negotiated on a case-by-case basis. Listed below are suggested elements that should be incorporated into an agreement. Examples of agreements from other events should also be reviewed.

Elements to Consider in an Agreement between Co-Organizers of an Event:

1. Clear description of the event, its location, and schedule.
2. Time length for the agreement.
3. G-I requirements for membership on the Organizing and Technical Committees.
4. G-I requirements for roles and responsibilities of members on the Organizing and Technical Committees, including the decision-making authority delegated to these members by their parent organizations.
5. Who has intellectual ownership and rights to the conference.
6. Who has control of:
 - establishment of registration fees and fee collection
 - disbursement of funds for conference expenditures
 - financial and legal contracts pertaining to the conference
 - venue selection
7. Obligations and responsibilities of each party related to organization of special events, trade shows, venue logistics, promotion, financing.

8. Special registration rate structures and complimentary registrations.
9. Compensation, split of proceeds.
10. Cancellation.

D.3.3. Solicitation from the G-I to Other Organizations

Frequently it may be to the benefit of G-I conferences, meetings, or other such events to solicit co-sponsorship from other organizations. Reasons for inviting co-sponsors might include:

- Increase event advertising to attract more attendees.
- Help meet annual goals to increase membership/sales by exposure through other organizations.
- Add diversity to the G-I event by sharing conference planning, and/or including special sub-events administered by other organizations.

The suggestions included in this section pertain primarily to requests to other organizations to be Cooperating Organizations. If the G-I is requesting another organization to be a Co-Organizer, then the guidance provided in Section D.3.2.3 above should be reviewed.

D.3.3.1. Requests to Prospective Cooperating Organizations

The organization being solicited should meet the following criteria:

- The goals of the other organization should be of potential interest and value to the spectrum of G-I membership
- The management of the other organization should reflect professional standards.
- The other organization's size, membership, and potential for exposure of the G-I event should be of value in meeting G-I goals related to increased attendance, membership, and/or sales.
- There must be a mechanism for verifying that the other organization is meeting its commitments for being a cooperating organization.

D.3.3.2. Sample Forms for Solicitation

Attached in Appendix F.2 is a "Sample Information Request Sheet" for soliciting a cooperating organization, and attached in Appendix F.3 is a "Sample Response Form" for the prospective cooperating organization to return to a contact person in the G-I making the request. These forms would typically be mailed to the appropriate contact person in the organization being solicited, transmitted with a cover letter signed by a member of the organizing committee.

D.4. Administration

Contracts with ASCE or external organizations to administer an Event must be reviewed by the CEC and approved by the G-I. An example agreement is provided in Appendix G.

D.5. Event Evaluation and Report

Procedures are provided below for evaluating the performance of a G-I Event and for reporting these results.

D.5.1. Performance Evaluation

The following performance information should be collected:

- List of registrants, including type of registration (e.g., full, daily, student)
- Attendance estimates for all activities
- List of exhibitors with addresses and phone numbers
- Summary of publication sales
- Completed evaluation surveys distributed to all attendees, exhibitors and co-sponsors. Sample survey forms are included in Appendix H.
- Number of rooms booked in conference hotels

Any resources required to collect this information should be considered in developing the budget.

D.5.2. Post-Event Report

A Post-Event Report must be prepared by the Organizing Committee and submitted to the CEC within 4 months of the Event date. This report should follow the following format:

- Report Text
 - Introduction: background and objectives for the Event
 - Attendance: number of registrants with a breakdown by profession and location, attendance at individual activities, summary of attendee survey results
 - Exhibitors: number of exhibits, types of exhibits, and summary of the exhibitor survey results
 - Publications: summary of publications produced
 - Marketing: summary of marketing activities and an assessment of their success
 - Finances: explanation of how the budget evolved and comparison of actual expenditures with budget estimates, summary of any grants or donations
 - Administration: summary of how the conference was administered and discussion of any problems and how they were resolved
 - Co-Sponsorship: discussion of co-sponsorship arrangements and summary of co-sponsor surveys
 - Recommendations for Future Events: summary of recommendations for planning future G-I Events that the Organizing Committee has for the G-I, the Technical Coordination Council, the Events Committee, and/or future organizers
- Appendices
 - Proposal
 - Promotional Materials
 - List of Attendees

- Attendee Surveys
- List of Exhibitors
- Exhibitor Surveys
- Final Conference Program
- Final Budget and Actual Expenditures
- Conference Administration Contracts
- Co-Sponsorship Agreements
- Co-Sponsor Surveys