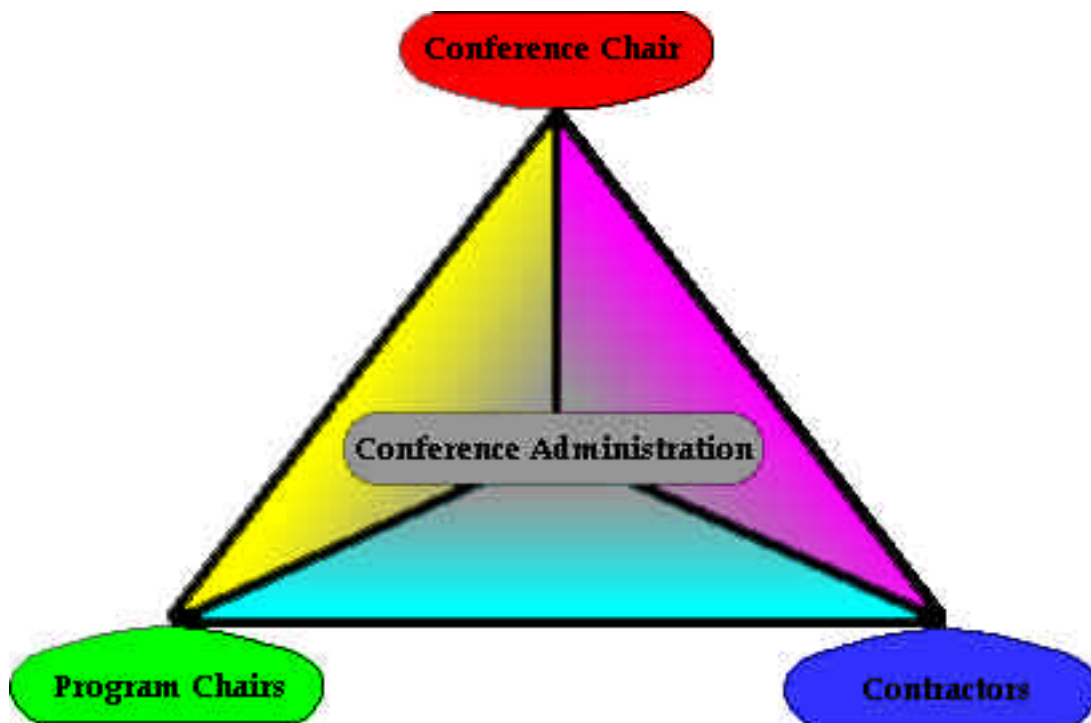


1998 Conference Management Model

The attached document is the report from the 1998 conference management model group. This report was presented to the SIGGRAPH Executive Committee in Mary, 1998, and the portions dealing with conference administration and conference services were approved. The portion of the report dealing with volunteer structure was tabled because of its relationship with ongoing discussions about SIGGRAPH management structures.

SIGGRAPH Conference Management Model 1998 Revision



Presented to the SIGGRAPH Executive Committee

May 2, 1998

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1: Executive Summary

The 1998 Conference Management Model Review Group (CMRG) recommends that SIGGRAPH revise the 1995 conference management model fairly extensively. The 1995 model was based on the premise that the content and operational parts of the conference could be separated and assigned as separate responsibilities for the volunteer Conference Chair and the contractor Chief Staff Executive. It has become clear that these two aspects of the conference are not separable and cannot be genuinely distinct if the best decisions are to be reached for the conference. It has also become clear that individual conference chairs will need to work with the chief staff executive and administrative staff in different ways, and that a successful model needs to be flexible to support these differences. Further, the 1995 model gives little attention to the role of the group that has become the Conference Advisory Group (CAG). The 1998 model makes this volunteer role more explicit and attempts to deal with issues such as volunteer time commitments.

In addition to the changes above, the 1998 model views conference management as composed of two parts: volunteer oversight and administrative services. The additional component of conference management in the 1995 model is a set of general conference services that is not properly an administrative area. In recognizing that the general conference services is properly separable from conference administration, the 1998 model recommends that the administrative and general services functions be obtained through separate contracts.

Thus this new model focuses almost entirely on the volunteer and contractor portions of conference administration. The structure proposed is built on the way the 1995 model has evolved in practice as well as a consideration of how the various functions naturally fit together and support each other.

The general roles of the three areas addressed in this report are as follows:

- Volunteer oversight covers financial oversight, volunteer personnel development, conference program development and implementation, contractor assessment, strategic planning and its implementation, and multi-year issues.
- Administrative services covers support for all conference and conference advisory group activities and decisions, taking ownership of decisions as determined in coordination with 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.
- General conference services covers 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.

As the reader will note, this report includes several 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, contracts, and bylaw changes that will be needed to implement it.

2: The Process

The CMRG met in Dallas on April 4/5, 1998 to consider possible changes to the conference management model approved in April, 1995. CMRG members in Dallas were Walt Bransford, Steve Cunningham, John Fujii, Chuck Hansen, Pat McCarren, Theresa-Marie Rhyne, Warren Waggenpack, and Jackie White. Scott Owen was unable to make it to Dallas because of weather-related travel problems. Further discussion occurred at the SIGGRAPH 98 committee meeting on April 18/19 and on a conference call April 22. CMRG thus comprises five conference chairs, six members of the Conference Advisory Group, and five members of the SIGGRAPH Executive Committee.

The group, along with Steve Van Frank, who had been involved in developing the original 1995 model, had met in Seattle in January, 1998 to review the evolution of conference management practice and to consider the needs that the conference management model should meet. The results were presented to the SIGGRAPH Executive Committee (EC) as a report on the history of conference management since 1995 and as a summary of needs for conference management, and there were discussions of the model with conference contractors and conference committee members. There was a further discussion at the SIGGRAPH EC meeting in Salt Lake City on February 21, 1998.

The work in Dallas focused on articulating the concepts of conference management that group members had been forming from comments, discussions, and experience over the three months since the Seattle meeting. There was a high level of agreement about most of the features in the model presented below. At the end of the meeting Steve Cunningham, John Fujii, and Warren Waggenpack were charged with producing a draft of this report, but it has been reviewed by all the CMRG members and their comments have been taken into account in this report.

The CMRG considered three basic models for conference administration and chose to merge parts of them into the final model we present here. Sketched very quickly, these models are:

Model A (modified Queen Anne)

CMRG considered adapting the 1995 conference management model to retain a single contractor who would provide both conference administration and conference services functions. The adaptation would break out funding for each year's conference support and for CAG support so each function's expenses could be more clearly tracked. It would further refine the leadership role and authority of the CSE with regard to functions such as strategic planning, chair choice, and contractor evaluation. Finally, it would define the CAG role more clearly as being volunteer-driven.

Plus:

- single contract would reduce the number of contracts that must be managed
- single contractor would accommodate the seasonal staffing fluctuations
- would provide solid backup and training for CSE and staff support
- better communication between conference administration and conference services since they would be under one roof
- keeps communications clearer and simpler
- there may be some economies of scale

Minus:

- there are significant concerns from contractors about their potentially having to compete against the CSE provider for other portions of contracted conference services
- conceptual difficulties and perceptions of conflict of interest to have the CSE manage (even if only functionally) another part of the same contract

Model B (separate administration and services models)

This model would separate conference administration and conference services into two pieces with separate contracts. This is seen to reflect an appropriately separate role for these two functions, and permits conference administration to manage conference services functionally without any confusion over their respective roles. These two functions may or may not be provided by two contractors; it is not the CMRG intent to make any implication about who holds the contracts but only that there is not a confusion about these two roles.

Conference services would function like the other conference contracts. It would be functionally managed by the CSE but formal oversight and evaluation are the responsibility of the conference chair. The conference administration would provide general project management, in the sense that the conference and CAG operations are each seen as projects. Final responsibility for the conference rests with the conference chair; final responsibility for CAG rests with that group's chair.

Conference administration would be provided by a co-located CSE and staff. They would provide support and coordination for all conference and CAG operations. The CSE would have decision powers in appropriate areas and would have financial oversight for the budget, paying bills, reporting, forecasting, and conference closing.

An intriguing possibility discussed under this model was for conference administration to maintain a pool of program admins for conference program chairs. This would provide a source of experienced, tested people who could be maximally effective in supporting programs.

Plus:

- this separation of functions is more natural and provides a uniform model for contractor functional management

Minus:

- if the conference administration contractor is of modest size, they might have difficulty in providing adequate staffing for all the variations in conference needs over the lifetime of the conference
- the CSE function retains more explicit authority for many functions than are warranted by comments about volunteer- versus contractor-driven processes
- if the same contractor should hold both the conference administration and conference services contracts, the concerns of other contractors as noted in Model A still obtain

Model C ("the whole enchilada")

Many conferences are developed with one contractor who provides the many functions for which the SIGGRAPH conference contracts. This includes conference administration as well as other functions that range from conference services to accounting, from public relations to audio-visual services. Should SIGGRAPH choose to adopt this model, the CMRG believes that there are contractors who could provide this range of services, either independently or through

subcontracts. Such a model would develop the conference by having the contractor develop the conference functions and would have program chairs simply provide content to fit into these functions.

Plus:

- Would require much less conference volunteer time and effort, and volunteers could concentrate on content
- There would be economies of scale in having one contractor provide all services

Minus:

- CMRG questions the level of creativity this model would offer the conference
- CMRG questions whether there would be adequate checks and balances in development
- There would be significant risk in putting all our reliance on one contractor
- Believed to lead to cookie cutter events

Conclusions

The CMRG came to the conclusion that the most productive model for conference administration would be developed from Model B with modifications as needed to address other issues. These issues include, among others, the role of the CAG, the relationship between CAG and EC, and the delegation of authority from the conference chair and volunteers to conference administration staff. No matter what model is implemented, the CAG and EC must spend sufficient time educating all volunteers and contractors as to what roles and responsibilities reside with whom.

3: The Role of the Conference Advisory Group

The 1995 conference management model focused on shifting from conference leadership by volunteer conference (co-)chairs to an increased conference staff leadership in a co-chair role alongside the volunteer conference chair. It did not deal at any depth with the roles of volunteers in conference administration, and it has become apparent in the various discussions that this role is critical to the success of any model. Thus the presentation of the 1998 model begins with the role of the group charged with providing multi-year conference leadership, called by its current name of the Conference Advisory Group (CAG).

Membership

The makeup of the group is generally reasonable. It now includes recent and rising conference chairs, an elected member of the SIGGRAPH Executive Committee (EC), the Chief Staff Executive (CSE), and other conference staff as appropriate to the subject matter of the meetings. The volunteers on this group are its voting members; staff members are non-voting. One of its conference chair members serves as a voting member of the EC and the CSE serves as a non-voting EC member. Concerns about the group's makeup focus primarily on three things:

- the conference chair member who serves on EC is the current year's chair, who may not have the time to focus on EC issues,
- the EC member is the SIGGRAPH Chair, who may not have the time to perform both the CAG functions and EC functions required by the positions,
- the CSE serves as the chair of the CAG.

These concerns are addressed in this model by redefining the positions and the roles of the CAG members.

Communication

There were many comments that questioned the communications between CAG and EC, and 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. The lack of effective communication in the recent past is due in great measure to the divided attention of the shared CAG/EC representatives.

Responsibilities

While CAG has been developing its sense of its responsibilities, these are not well known outside the CAG itself. It is important that CAG complete its unfinished work here, that it 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.

Time Management

The discussions before Dallas emphasized the need to reduce the travel and the workload of the CAG positions. This model does not directly make such a reduction, and in fact there is some danger that the shift of the accountability and final decision-making of the new model might take more volunteer time. However, the model does reduce the time commitment of the current conference chair and of the SIGGRAPH Chair, and the CMRG discussions included several techniques that could reduce the time commitment for CAG work. This area seems likely to need continuous monitoring and continuous effort to find creative ways to get work done with minimal time.

4: The Roles of Conference Administration and Conference Services

The 1995 conference management model covers the functionality of a Chief Staff Executive and an associated staff, as well as a number of functions historically associated with SIGGRAPH conference management (herein called conference services). The CMRG believes that the CSE concept should be retained. However, the kinds of functionality involved in these two areas are not necessarily part of one model or contract. The overall model will separate these two parts of the 1995 model functionally and will propose separate contracts for them, and will also make changes in the specific functions of the CSE. The new model will extend the per-conference role of the conference manager, a member of the CSE staff, to a more per-conference structure for the entire conference administration model.

Highlights of these changes:

Some of the changes in the CSE role in conference administration in this model include:

- The operations "co-chair" role of the CSE role is to be reshaped into more 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).
- While functional management of contractors will remain with the CSE, the contractor evaluations will become the task of the conference chair.
- While the CSE will remain an important participant in and contributor to the CAG, the CSE will not be the chair of CAG.
- While the CSE will continue to maintain the list of applicants for chair of future conferences, the actual recruitment and orientation roles for conference chairs will become the task of the chair of CAG.

Many parts of the CSE role are unchanged, however, as will be noted when the new model is compared to the 1995 model.

In comparison to the changes on conference administration, there are very few changes proposed for the conference services function. This reflects the mature and successful nature of this operation and how well it now serves the conference.

5: The Revised Conference Management Model

This model covers the two areas of volunteer oversight and conference administration. It describes the role of the Conference Advisory Group in detail and specifies the functions of conference administration and the relation of this administration to the other components of the conference.

The Conference Advisory Group

Makeup

The CAG will be comprised of the immediate past and current years' conference chairs, any future conference chairs who have been appointed and confirmed, a committee chair described below, a representative 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 will be appointed with nomination from the CAG and confirmation by EC vote and will serve 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 past volunteers who have significant conference experience. There is an expectation that the appointment would last at least two years but no more than four years to match the general experience on effective terms of office. The CAG Chair will communicate conference issues to EC, will be the primary CAG leader for strategic planning, and will take a leadership role in recruiting conference volunteers. The CSE will be a primary resource to the CAG in gathering information, researching conference issues, and supporting strategic planning. The CSE will continue to serve in an *ex officio* role on the EC in order to ensure a direct reporting function for the current conference now that the current conference chair will no longer serve on EC.

The EC representative on the CAG will be appointed by the SIGGRAPH Chair on close consultation with EC and CAG, and will serve as a voting member of the CAG. This representative will have two primary attributes: an organizational experience and point of view, and enough conference experience to be able to contribute to CAG decisions. The representative may already be a member of EC, and this is highly desirable, although this is not a requirement. This position will not itself carry a vote on EC but the representative will attend EC meetings, will participate in conference calls as an EC member, and will be the primary channel for communicating organization issues to the conference.

It should be noted that the CMRG discussed whether the CAG Chair should be appointed by the SIGGRAPH Chair or elected by the SIGGRAPH membership, and recommends that EC discuss this as part of the bylaws discussion that will be needed to replace the current year's conference chair as a voting member of EC.

Communication

Communication with the EC will be enhanced by identifying the reporting duties of the CAG Chair and the EC representative to CAG. 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. CAG will provide minutes and 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 EC

will provide minutes and draft agendas for EC meetings to CAG, and CAG will be invited to communicate with its members on EC to raise issues to EC.

In addition, CAG will increase its communication with the SIGGRAPH community about conference activities and initiatives through such means as a regular column in *Computer Graphics*.

Responsibilities

CAG assumes a number of responsibilities in its overall role of 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
 - 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 for confirmation by EC
 - advise SIGGRAPH Chair on EC representative to CAG
 - recruit conference chair candidates, review applications, and propose chair to EC
 - 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
 - evaluate cost and impact of proposed new conference programs
- Assessment
 - cultivate volunteers and provide assessment for potential conference volunteers
 - assess contract performance as input to conference chair evaluation
 - 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 and contribute to organizational planning
 - 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.

CMRG recognizes that this issue is an internal management issue for CAG. Because of volunteers' varied backgrounds, each conference chair will likely take ownership of 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. In addition, the changes in the makeup of the CAG noted above will relieve the current conference chair and the SIGGRAPH Chair of some of their travel and focus commitments, and this should relieve two of the most serious examples of over-commitment.

CAG is expected to explore other approaches to relieving travel commitments, including re-arranging meeting schedules so that the group meets only at selected conference committee meetings, holding its larger meetings before or after conference committee meetings instead of at separate focused meetings, 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.

The Conference Administration Functions and Staff

In examining the role of conference administration, the CMRG first examined the responsibilities of the conference chair to deliver a particular conference and the CAG to develop the long-term strategic direction of annual conferences. The CAG and each year's conference were characterized as projects, each with a stream of specific phases and deliverables. Ultimate responsibility for creation, implementation, and follow-through of each project resides with the corresponding conference or CAG 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

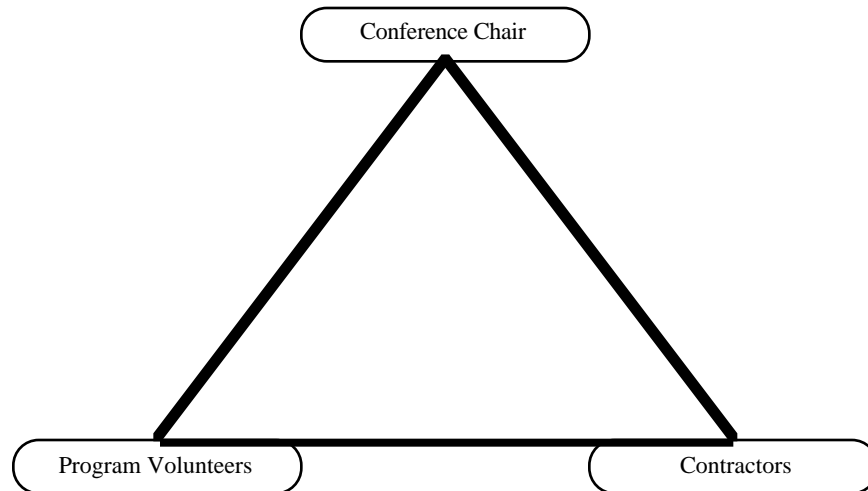
The first point involves communicating to the entire conference committee what is uniquely important to the chair's vision when the new committee is formed, including specific communications to individual members on particular issues, and refer to these communications in the end to see if their needs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

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. 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.

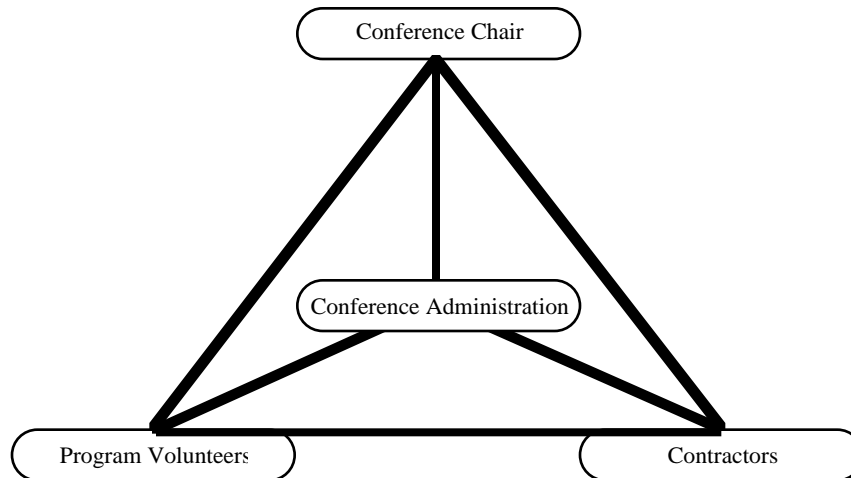
This means that conference administration helps to identify, monitor, coordinate, and prompt essential decisions and actions required of the conference chair.

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, alternative generation, 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 and delegated authority 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. 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.

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. 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.

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 SIGGRAPH organization. Thus the conference chair is accountable to CAG and both CAG and the conference chair are accountable to the 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 SIGGRAPH Chair if ultimately necessary.

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.

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

- Working with the conference chairs in preparing preliminary and final conference budgets for approval by the SIGGRAPH EC and ACM.
- Supporting the hiring, supervision, and evaluation of staff supporting SIGGRAPH conferences.
- Developing and managing a program to ensure motivation for and a supply of volunteers with corporate support.
- 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.
- Developing a network of donors and sponsors for the SIGGRAPH conference, and applying a systematic approach to the allocation and recognition of these donations.
- Working with CAG and EC to develop a model for performance review of all contractors, and supporting the conference chair in carrying out these reviews

From a conference perspective, each conference shall have full-time project support dedicated to administering its progress and fulfillment. Primary tasks at this level 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 SIGGRAPH EC and ACM to ensure that they are fully informed of all conference activities.
- Serving as primary contact and coordinator for external 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 SIGGRAPH EC and ACM.

As noted earlier, conference administration should consider maintaining a pool of experienced admins for conference program chairs. Familiarity with SIGGRAPH databases and policies and procedures would facilitate maximal effectiveness in supporting program chairs, although the fact that these admins would not be geographically close to their program chairs might be a problem.

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 functions. This coordinator's role in supporting this work includes:

- Working with CAG and the EC to develop 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.
- To prepare requests for proposal (RFP), support the selection process and negotiate contracts on behalf of SIGGRAPH for approval by CAG, EC, and ACM.
- To attend 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.
- Assisting SIGGRAPH volunteer leadership in recruiting future Conference Chairs for approval by the SIGGRAPH Executive Committee.

From a global perspective, conference administration is led by a Chief Staff Executive (CSE) who oversees the quality and completeness of the project coordinator'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. As director of all conference administration services, this individual should possess adequate historical and technical expertise in the field of computer graphics and should be knowledgeable about SIGGRAPH and ACM to support overall conference improvement. This individual should be able to step in work with the CAG to carry out all the roles of the conference chair case of temporary incapacity of the chair or during a transition period in case a chair must step down. In particular, this individual can help support the critical liaison and translation of industry-specific interests for conference functions such as marketing and exhibits.

In addition to the CSE, a number of other persons will be part of the conference administration operation and will be provided by the conference administration contract. Each conference should have a dedicated conference support person who will provide much of the day-to-day conference project support noted above. Additional staff will provide committee support and financial management. The RFP and contract for conference administration should provide additional details for these support functions.

Because the conference administration function will support so many projects at one time, it is important that we are able to understand how this effort is allocated among the projects. CMRG thus recommends that the contract for this function be set up on a per-project bases, and that actual payments for the contract be based on actual costs for each project. This is in distinction to the flat-fee method put in place by the 1995 conference management model and supporting contracts.

Because the role of the CSE is central to the success of conference administration, CMRG recommends that the CSE in the proposed contract must be interviewed and approved by the bid review group as part of the bid evaluation.

6: The Revised Conference Services Model

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. As noted in the Executive Summary, the general conference services functions are believed to be well established and were not really the focus of discussion by the CMRG. As such, the remainder of this section serves simply 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 & SIGs, 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 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

In order to implement the model we will need to go through bid processes for both conference administration and conference services. This will require that we have two RFPs, two sets of bids, two sets of bid evaluators, possibly two bidder interviews, and that we write two contracts. This is a large amount of work and will require us to create a staggered bid schedule. We plan to develop the conference administration contract first and the conference services model phased slightly behind it.

The plan to implement the conference administration model is as follows, with all dates except the date for final approval fairly approximate:

- a. Present the model to EC and get approval -- May 2, 1998
- b. Name the group to develop the RFP for conference administration -- early May
- c. Name the group to evaluate bids for conference administration -- mid June
(Note that this may or may not be the same as the RFP development group)
- d. RFP sent to potential bidders after review by EC and CAG -- August 1
- e. Bids received from candidate firms -- November 1
- f. Bids evaluated by evaluation group -- November 15
- g. Presentations by contract finalists, if needed -- December 1
- h. Contractor selected and presented to EC for ratification -- December 12

This will allow the conference administration contractor to begin working with Jackie White for SIGGRAPH 2000 about a month before the date of the conference strategy meeting in mid-January.

The schedule for the conference services contract is somewhat more relaxed, because this contract need not be in place before early 1999. Thus the process is much like that for conference administration, but it is expected to be delayed by some three months from the dates above. In the longer term it may be advantageous to have the conference services contract offset from the conference administration contract so that conference services could support the CSE and staff's startup work if a new conference administration contract were let, but that will be decided by the RFP and contract groups.

8: Measuring the Success of Conference Administration

When the conference administration effort is evaluated each year, it will be 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 chair responsibilities success, 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.

The global levels will 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 representative 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? (Since this function does not perform evaluations anymore...)
- 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?