Our “kernel” might be in the form of:

Len’s articulation of:

1. Why it is a bad idea to cap the registration fee (subsidize attendance)?
2. Why we should raise our minimum expectation of surplus (>$25K)?
3. Len’s story as a first time local host: “I thought that we could do X and Y once we rose, locally, $$ above and beyond $25K…”

Aldo’s articulation of:

1. A “new” schema that organizes the expenses and revenues according to the following categories:
   1. Essential costs
   2. Expected surplus
   3. Costs with things participants have come to expect
   4. Costs with “new” things close to the heart of the conference organizing committee/hosts
   5. Net gain/loss (types 1, 2 and 3)
   6. Conference registration revenue should be estimated to cover item A
   7. Sponsorship raised by the Society Office should cover X% of item B; $$ in excess go to paying for item C
   8. Sponsorship raised by the organizing committee/hosts should cover (100-X)% of item B; $$ in excess go to paying for item D
   9. Differences between A and F are computed as a net gain/loss type 1; this difference is due to imbalance between budgeted essential expenses and forecasted registrations revenue, versus actual $$
   10. It is up to the Society Office to make decisions that adjust expenses associated with items C, to make sure its share of item B (X%) is covered; differences here are computed as net gain/loss type 2; this difference is due primarily to the success of the Society fundraising effort, vis-à-vis the actual expenses with things participants have come to expect
   11. It is up to the organizing committee/hosts to make decisions that adjust expenses associated with items D, to make sure its share of item B (100-X%) is covered; differences here are computed as net gain/loss type 3; this difference is due primarily to the success of the organizing committee/host’s fundraising effort, vis-à-vis the actual expenses with “new” things close to the heart of the conference organizing committee/hosts

Hopefully we can use the actual numbers for the ABQ conference to illustrate how this would work in practice. Perhaps, taken together, this might constitute a strong argument for dividing and clarifying authority and responsibilities between the Society Office and the conference organizing committee/hosts.

Background notes:

* We went from thinking about lessons/reflections/insights that came out of our experience that might be helpful to others, to trying to identify problems (from the perspective of the local hosts) with the way the conference is funded/organized today
* Lessons/reflections/insights might have to do with things like:
  + Start early
  + Figure out how to deal with the uncertainties (at a personal level)
* The identification of problems is aimed at suggestions/recommendations for fixing them, such as:
  + Clarify responsibilities and expectations to reduce uncertainty (and disappointment)
  + Provide the local hosts with discretion on how to use the $$ raised locally
* The bullets that we generated during this early discussion were:
  + **Dealing with uncertainty** (associated with resource availability, timing, and who’s the decision maker?); for example, we didn’t know how much was available for the welcome reception until the last minute, and we had to take personal risks to put in place, sometimes aggravating the conference manager, who wanted to be involved in the decision of where the welcome reception would be (hotel vs. museum) and when it would take place (Sunday or Monday)
  + **Impact of registration fee** –was set as low as possible (perhaps by an implicit cap) at $450; this value was judged feasible because the forecasted revenue from local sponsorship was taken into account without putting anything aside for the local “wish list”
  + **“Bare bones” to “ideal” conference spectrum** –we think this way of looking at the conference (as per previous page) is more useful than separating home office vs. site-specific expenses; the latter shifts the burden of much of the conference provisions to the local hosts without providing local hosts with the corresponding authority to make decisions (such as the value of the registration fee) and the means (access to the financial resources)
  + **Different sources of funding should be allocated differently; who has the authority over which funds?** –this item gave rise to the notion of separating expenses (essential, budgeted surplus, expected goodies, local flavor/extras) and allocating differently the sources of revenue (registration fees, Society sponsorship, local sponsorship) [[1]](#footnote-1)
  + **Should the role of the organizing committee/local hosts be of helpers or champions?** Could it vary depending on the conference? The role of helper does not motivate people to find new sponsorship and inject a local flavor, as much as the role of champion. Local hosts that champion for an excellent conference will attempt to influence the configuration and character of the conference. They will add or subtract features. They will be proactive about the program. There are important implications to the conference manager and program committee if the local hosts perform as champions rather than helpers.
  + **Decoupling of local organization and program –**For our conference, and we suspect for most conferences prior to ours, the organizing committee/hosts made significant contributions to the assembling of the program (new threads, discussant-type sessions, invited speakers). The new policy to assign the program chair separately from the proposed venue/organizing committee increases the likelihood of disconnects. If the program committee is not an integral part of the conference organizing committee, how can the latter influence the former, to inject a local flavor into the program?

1. We have to be careful how we call these things. There are two types of sponsorship to the Society: annual and conference specific. Here, we are talking about the latter. We need a better name for “local” sponsorship –e.g., the moneys from Boeing and DHS. They are not local per se. [↑](#footnote-ref-1)