CONFERENCe MANUAL

February 2006
PREFACE

This manual is the fifth revision of The Society for Historical Archaeology’s *Conference Handbook*. This manual will be in effect immediately upon approval by the SHA Board. It is anticipated that the 2007 meeting in Jamestown-Williamsburg will be the first to use this fifth revision. This version still contains much of the material compiled in earlier manuals by Lester A. Ross, William H. Adams, Michael J. Rodeffer, and Barbara Garrow. Most appreciated are the pioneering efforts of these individuals in developing and standardizing conference procedures.

This revision reflects major changes in which the annual conference is organized and administered. The SHA has traditionally turned over the annual meeting to a local committee with minimal oversight and assistance from the Society. That meeting approach began to change with the Providence, Rhode Island, meeting in 2003 after the Society retained a professional management firm to serve as its Headquarters Staff. The meetings in 2004 (St. Louis), 2005 (York), and 2006 (Sacramento) were subsequently planned and carried out in the absence of an up-to-date *Conference Manual*. This revision reflects the organization and procedures that have developed since 2003, and is based on lessons learned during the transition from an entirely volunteer-based to a professionally assisted conference process.

The topical organization of the contents has resulted in what appears to be a lot of duplication. To paraphrase Vergil Noble, the Committee prefers to consider repetition as positive reinforcement, not duplication. The notebook style is designed to allow for inserting revisions as they occur.

Finally, the Committee views the manual as a working document. We realize that not all questions related to conference planning can be addressed, completely explained, or fully illustrated. It is a charge to the Conference Committee to keep the manual updated, based on user comments and experience, and SHA Board policy.

Patrick H. Garrow 2006
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I. INTRODUCTION

PURPOSE AND ORGANIZATION

The Conference Manual is designed as a guide to aid planning, organizing, and implementing the society’s annual conference. The purpose of this manual is to communicate society policies and standard meeting practices, and to share the cumulative experience gained from past events.

Increasing attendance, program diversification, and organizational complexity of the annual meetings during the late 1970s led to the recognition that conference quality and continuity could be improved with a planning handbook. Discussions in 1981 led to the appointment of Lester A. Ross as Conference Coordinator (1981–1984) and his subsequent preparation of the first manual, Conference Planning Handbook, in 1982. This document was rewritten and revised between 1986 and 1988 by William H. Adams, Conference Coordinator (1985–1989), and Lester A. Ross to incorporate policy and procedural changes. In 1994 and 1995, the third revision was produced under the direction of Michael Rodeffer, then Conference Committee Chair. The fourth revision was completed by Barbara Garrow in 2001 to reflect changes in Board policy and improved procedures. This, the fifth revision of the Conference Manual, was driven by the retention of a professional management firm to handle the business of the Society that now takes an active role in planning and implementing annual meetings, particularly in the logistical and financial management areas.

Organization of this manual is topical. Section I, Introduction, provides a general overview of conference organization and history. Section II, The Proposal, presents guidelines for proposal preparation, submission, and evaluation. Section III, The Hotel, details the process of evaluating, negotiating, and contracting for hotel facilities and amenities. Section IV, Finances, discusses the parameters of budgeting and fiscal administration. Section V, The Program, outlines the considerations, methods, and practices for developing, scheduling, and implementing the annual program. Section VI, Registration, contains practices and procedures employed in meeting registration. Section VII, Administrative and Service Functions, discusses various events and activities that serve the society at the meeting. Section VIII, Conference Reports, summarizes the types, contents, and value of requisite reports.

SIGNIFICANCE OF THE ANNUAL MEETING

The annual meeting has played an important role in the founding, growth, and development of the SHA. The society was conceptualized and founded in 1967 during the International Conference on Historical Archaeology, which convened at Southern Methodist University, Dallas, Texas. The proceedings of this conference became the first
issue of Historical Archaeology. Subsequent meetings of this conference became those of
the society.

In 1970 individuals interested in underwater archaeology organized the International
Conference on Underwater Archaeology (ICUA). Between 1973 and 1986 the ICUA and
the society’s conferences were held concurrently. The Advisory Council for Underwater
Archaeology (ACUA), the organizing group for the underwater conference, was
recognized as a standing committee of the society during the 1976 meeting. Their
respective boards merged the two conferences in 1986 when the title for the 1987 and later
meetings was changed to the SHA Conference on Historical and Underwater Archaeology.

The annual meeting provides a forum for the presentation of ideas on method and theory; a
setting for delivery of current research data; a venue for caucuses, workshops, roundtables,
and symposia on technical, social, or political issues; an opportunity for public education;
and a place to socialize with one’s colleagues. Each of these elements contributes to the
vitality of the field through the dissemination and exchange of information and personal
networking.

Since 1990, the annual conference has been expected to yield revenue. Revenue from the
Tucson, Richmond, Jamaica, and Kansas City meetings (1990–1993) averaged about
$10,500. From the meetings in Atlanta, Salt Lake City, and Quebec City (1998–2000), the
average rose to $15,097. Conference revenue declined after 2000, and several conferences
even posted financial losses. A major goal of this fifth Conference Manual revision is to
insure that the financial losses cease and that conferences once again contribute positively
to the Society’s budget.

ORGANIZATIONAL OVERVIEW

General Responsibilities

The annual conference is planned and conducted under a general set of SHA policies and
procedures that have evolved over the years. Experience, precedent, and specific
administrative and scholarly objectives serve as sources for meeting guidelines. General
organization and conduct of the conference are defined by the society.

Conference Committee

The Conference Committee serves as the interface between the society’s Board of
Directors and the Site Committee. The purpose of the Committee is to:

• Provide continuity in planning and administration from one meeting to the next
• Serve as a forum for the interaction of new and experienced conference organizers
• Develop relevant policy and procedural recommendations for board consideration
The Conference Coordinator, who is appointed by the SHA President, chairs the committee. The Conference Coordinator recommends appointment of Conference Committee members to the President. Members are selected from previous and future meeting organizers and other interested individuals. The standing members of the committee include the Employment Coordinator, the Continuing Education Coordinator (member of the Academic and Professional Training Committee and not formally a Board appointed position), and the Awards Committee Chair. The committee meets annually at the conference, but has frequent communication throughout the year.

The Conference Coordinator reports to the SHA Board at the annual and midyear meetings. A written report summarizing the status of past and future meetings and other committee activity is prepared and submitted approximately 30 days in advance of each Board meeting. The Conference Coordinator is responsible in conjunction with the Headquarters staff for reviewing meeting proposals, presenting them to the Board, and conducting site inspection trips. These site inspections, conducted in coordination with the Conference Chair and the Headquarters staff, include review of the hotel facilities and the proposed hotel contract. The Conference Coordinator provides input on the hotel contract to the Headquarters staff, which is in turn responsible for hotel contract negotiations. Ultimate responsibility for executing the hotel contract rests with the SHA President. A major responsibility of the Conference Coordinator is to find persons and organizations willing to serve as the conference organizers and hosts (the Site Committee) for a minimum of four years in advance of the proposed conference.

Site Committee

The conference Site Committee is a voluntary organization responsible for the planning, implementation, and administration of the society’s annual meeting in conjunction with the Headquarters staff and within the guidelines established by the Board. The group of individuals who desire to organize and host the annual conference forms the Site Committee. The Conference Chair reports to the Conference Coordinator. Reporting to the Conference Chair are site committee chairs with specific key responsibilities. These chairs are assisted by directors, which serve in backup positions and who also have specific responsibilities.

The Conference Chair, who has overall responsibility for this body and the resulting annual meeting, directs the Site Committee. This committee should include individuals who will serve in the following key conference positions: Conference Chair, Local Arrangements Chair, Program Chair, and Volunteer Chair. Additional personnel are added to the committee as planning progresses. Other important conference staff positions may include: Audiovisual Director, Terrestrial and Underwater Program Directors, Popular Program Director, Public Relations Director, and Traditional Crafts Director. The selection of the Underwater Program Director should be made in consultation between the Conference Chair, Program Chair, and the ACUA Chair; the person selected should be an underwater archaeologist who is actively involved in underwater resources management. Experience has demonstrated that the committee will require additional personnel as the
date of the conference approaches. These additional volunteers are usually from the host institutions, local archaeological societies, the interested public, and students who receive free registration based on their commitment to volunteer for a prescribed amount of hours during the conference. The following figure (Figure 1. Site Committee) illustrates these site committee positions and Table 1 describes their responsibilities.

**Conference Staff**

Conference staff is a coalition of the Site Committee members, the Headquarters staff, and three individuals (Conference Coordinator, Awards Committee Chair, and Continuing Education Coordinator) who serve in society positions related to meeting activities. The society’s Conference Committee provides continuity from meeting to meeting by assisting with or coordinating established annual activities in cooperation with the local organizers. These positions are described in Table 2. Positions in bold font are required, and the other positions are recommended as needed to run the conference.
### TABLE 1. SITE COMMITTEE STAFF

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<tr>
<th>POSITION</th>
<th>RESPONSIBILITIES</th>
<th>DUTIES</th>
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<tr>
<td>Conference Chair</td>
<td>Directs site committee staff and coordinates primarily with the Conference Coordinator, the Headquarters Staff, and other SHA officials as needed to run a successful meeting.</td>
<td>Principal duties include: prepares the meeting proposal; selects the Conference theme; coordinates invited sessions, plenary session speaker(s), public archaeology event theme and program, recommends local events; in conjunction with Headquarters staff, develops the Conference budget for review and approval of the Board; periodically briefs the Conference Coordinator, Board, and membership; oversees meeting planning and scheduling; and prepares or compiles conference summary report.</td>
</tr>
<tr>
<td>Program Chair</td>
<td>Responsible, under the general supervision of the Conference Chair, for coordinating all aspects of the program planning and implementation. Coordinates with appropriate chairs to ensure efficient organization and management facilities and events.</td>
<td>Principal duties include: prepares or compiles preliminary announcements and calls for papers; oversees paper selection, session organization, and time and space allocations; coordinates with Conference Chair and Headquarters staff on event scheduling matters; oversees or coordinates design, compilation, and production of conference program and abstracts; and prepares or compiles a report summarizing all aspects of program planning and implementation. The program chair is also responsible for contacting the SHA Continuing Education Coordinator for planning purposes.</td>
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### TABLE 1. Continued.

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<th>Role</th>
<th>Responsibilities</th>
<th>Principal Duties</th>
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<tr>
<td><strong>Terrestrial Program Director</strong></td>
<td>Responsible, under the general supervision of the Program Chair, for organizing or overseeing and implementing terrestrial plenary, symposia, and contributed paper sessions, and events.</td>
<td>Principal duties include: prepares, if delegated, or assists in compilation of preliminary announcements and calls for papers; participates in paper selection; develops and recommends session organization, event functions, and time and space allocations; coordinates with session organizers and chairs to provide scheduling data and administrative information or arrange space and equipment requirements; contributes to the design and compilation of the program and abstracts; and prepares a report summarizing all aspects of the terrestrial program.</td>
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<tr>
<td><strong>Underwater Program Director</strong></td>
<td>Responsible, under the general supervision of the Program Chair, for organizing or overseeing and implementing underwater plenary, symposia, contributed paper sessions, and events.</td>
<td>Principal duties include: prepares, if delegated, or assists in compilation of preliminary announcements and calls for papers; participates in paper selection; develops and recommends session organization, event functions, and time and space allocations; coordinates with session organizers and chairs to provide scheduling data and administrative information or arrange space and equipment requirements; contributes to the design and compilation of the program and abstracts; and prepares a report summarizing all aspects of the underwater program.</td>
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<tr>
<td><strong>Popular Program Director</strong></td>
<td>Responsible under the general supervision of the Program Chair for organizing or overseeing and implementing a public education program to be presented at the conference.</td>
<td>Principal duties include: solicits presentations, displays, and demonstrations for a popular session to be held in conjunction with the conference. Coordinates scheduling, event functions, equipment needs, and time and space allocations with the Program Chair and Headquarters Staff. Develops a detailed budget for review and approval by the Conference Chair and Headquarters Staff for all popular session functions. Prepares a report summarizing all aspects of the popular program and provides to Conference Chair. Works closely with the SHA Public Education and Interpretation Committee Chair to follow SHA policies.</td>
</tr>
<tr>
<td><strong>Local Arrangements Chair</strong></td>
<td>Responsible, under the general supervision of the Conference Chair, for organizing and implementing local events, and social functions.</td>
<td>Principal duties: plans and recommends social events and tours; works with Headquarters Staff to insure that costs are in line with budget; coordinates with appropriate individuals and organizations for off-site functions; oversees in cooperation with Program Chair and Headquarters Staff space and scheduling arrangements for events and functions; oversees or coordinates local publicity; prepares a summary report of local arrangement activities.</td>
</tr>
<tr>
<td><strong>Audiovisual Director</strong></td>
<td>Responsible, under the supervision of the Local Arrangements Chair, for organizing and arranging use of presentation equipment.</td>
<td>Principal duties include: identifies and locates equipment needs and sources with the Headquarters staff; gets approval from the Conference Chair and Headquarters staff for costs, oversees distribution and set up of required audiovisual equipment; schedules and supervises staff equipment operators during meeting; prepares summary report of audiovisual activities.</td>
</tr>
<tr>
<td><strong>Public Relations Director</strong></td>
<td>Responsible, under general supervision of the Conference Chair for public relations related to the annual meeting.</td>
<td>Principal duties include: Prepares news releases; and arranges for coverage by local, regional, and, occasionally, national print and electronic media.</td>
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<td><strong>Tour and Events Director</strong></td>
<td>Responsible, under the general supervision of the Local Arrangements Chair, for booking and handling tour logistics and other events as assigned.</td>
<td>Principal duties include: identifying potential tours and determining their costs; presenting a budget to the Local Arrangements Chair and Headquarters staff; arranging for approved tours, including schedules; providing the appropriate information to the Program Chair and to the Registration Chair; arranging for tour lunches, and handling the necessary logistics.</td>
</tr>
<tr>
<td><strong>Traditional Crafts Director</strong></td>
<td>Responsible, under the general supervision of the Local Arrangements Chair, for booking the traditional craftspersons for the conference.</td>
<td>Principal duties include: identifying regional craftsmen, booking them for the conference, arranging for appropriate demonstration space at the conference facility in conjunction with Headquarters Staff, coordinating travel arrangements and lodging for the craftsmen, and preparing an itemized budget for approval by the Local Arrangements Chair and Finance Chair.</td>
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<td>Volunteer Director</td>
<td>Responsible, under the general supervision of the Local Arrangements Chair, for recruiting and managing volunteers to aid with pre-conference tasks and meeting activities.</td>
<td>Principal duties include: plans volunteer needs in cooperation with principal chairs; identifies/recruits individuals to assist with meeting tasks or events; and develops schedules and coordinates assignment of personnel during the conference. If students are used as volunteers to offset registration fees, the volunteer is responsible for verifying their student status and for recording their volunteer hours so that the appropriate registration fees, if any, apply.</td>
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<tr>
<td>Photographer</td>
<td>Responsible, under the supervision of the Conference Chair, for taking photographs of conference events.</td>
<td>Principal duties include taking photos of conference events. These include photos of persons receiving their awards from the SHA President, group shots of the old and new SHA Boards, a group shot of the Student Subcommittee of the Academic and Professional Training Committee, a group photo of the local Conference Committee, and candid shots recording receptions, banquets, and other events. These photos are provided to the SHA Newsletter Editor for publication and provide a record of the conference for future reference. After newsletter publication, the photos are to be forwarded to the SHA Secretary for archiving.</td>
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TABLE 2. SHA CONFERENCE LIAISON STAFF

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<th>POSITION</th>
<th>RESPONSIBILITIES</th>
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<tr>
<td>Conference Coordinator</td>
<td>Responsible, under general supervision of the Board of Directors, for liaison between the society and the Site Committee. Coordinates with the Board of Directors, the Headquarters Staff, and the Conference Chair.</td>
<td>Principal duties include: oversees planning and implementation of conference to ensure continuity and effective management; evaluates conference venues and facilities; and prepares summary reports for the board.</td>
</tr>
<tr>
<td>Awards Committee Chair</td>
<td>Responsible, under the general supervision of the Board, for implementing the SHA’s awards program. Coordinates with the Board, the Secretary and Treasurer, the Headquarters Staff, the Conference Coordinator, and Conference Chair.</td>
<td>Principal duties: oversees selection of awardees; notifies recipients; oversees publicity relating to awards; coordinates awardee(s) travel, lodging, and conference benefit arrangements and payment/reimbursement with the Treasurer and Conference Coordinator; and coordinates with Conference Chair (or designee) to arrange conference awards presentation session.</td>
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<tr>
<td>Headquarters Staff</td>
<td>Headquarters Staff</td>
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<td>Responsible, under general supervision of the Board of Directors, for providing services to the conference and the membership. Coordinates with the Board of Directors, the Conference Coordinator, and the Conference Chair.</td>
<td>Principal duties include: Reviews potential meeting venues and solicits proposals from local Visitor’s Bureaus and hotels to identify venues that have suitable room and meeting spaces to host the annual meeting. Conducts site visits with the Conference Coordinator to evaluate potential meeting venues. Negotiates hotel and all conference-related contracts with input from the Conference Coordinator. Primary contact with conference hotel for all meeting space, BEOs, function sheets, etc. Provides information and input for preparation of the conference budget. Coordinates preparation of the Call for Papers and registration package for publication in the SHA Newsletter. Receives and handles all conference funds and pays approved conference bills. Maintains abstract submission and online registration process. Conducts on-site registration with assistance from the Local Committee and volunteers. Coordinates space for conference workshops. Responsible for production of all conference awards. Coordinates with conference exhibitors and overseas rental of table and booth space. Lead contact with conference hotel staff.</td>
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<th>Continuing Education Coordinator</th>
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<td>While not an official SHA Board member, historically this position is responsible for coordinating with the Program Chair, the Local Arrangements Chair, and the Conference Chair, to insure that the SHA Continuing Education Workshops are logistically handled.</td>
<td>Principal duties include: identifies workshop topics and solicits presenters; negotiates fees for services and coordinates purchase orders and payments with the SHA Headquarters Staff; provides the Program Chair information on the workshops for inclusion in the program; provides enrollment forms for including in the preregistration packets; coordinates with the Headquarters Staff for appropriate space and audiovisual needs; coordinates with the Registration Chair to insure that all SHA sponsored workshop enrollment forms are received in the SHA Headquarters Staff; consults with the local arrangements committee, as appropriate, when local venue offers special workshop opportunities.</td>
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<th>Employment Coordinator</th>
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<td>Responsible, in coordination with the Conference Chair, for planning and operating the conference Employment Center.</td>
<td>Principal duties include: prepares and coordinates employment information for use at the conference; ensures that employment information is adequately posted or displayed and facilities are suitably arranged for interviews; oversees and staffs the center during the conference; and prepares a summary report of Employment Center activities for the Conference Coordinator.</td>
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LEGAL AND FINANCIAL RELATIONSHIPS

With the acceptance of a proposal to host the society’s annual conference, the Site Committee becomes, in effect, a subcommittee of the Conference Committee. As a result, there is a direct connection to the SHA, which has ultimate liability for the conference. In order to conduct a successful conference, good faith is required on the part of the society, its Headquarters Staff, the Conference Committee, and the Site Committee.

As noted above, the Headquarters Staff negotiates the hotel contract during the local review visit, receives the contract from the proposed hotel, and presents it to the SHA President for review and signature. This work is done in close coordination with the Conference Coordinator and Conference Chair.

Convention interruption insurance, which is related principally to the hotel facility, may be provided by the society. Proof of this insurance is available from the Headquarters staff. The SHA does not maintain accident liability insurance. If this type of insurance is required, it is a conference expense and arrangements for purchase should be coordinated with the SHA Headquarters Staff.

HISTORICAL TRENDS

The following table, Table 3. Past Conference Information, summarizes the conference information from 1990 to the Year 2000. This table is designed to serve as a convenient reference guide to the SHA Board as well as to the conference and site committees. It includes the date, location, theme, registration information, number of papers given and sessions held, a list of sponsors, the local committee chairs, dates of important milestones, the fees charged, and the income, expenses, and net amount turned over to the SHA.
<table>
<thead>
<tr>
<th>Year</th>
<th>Location</th>
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<tbody>
<tr>
<td>1967</td>
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<td>2006</td>
<td>Sacramento, CA</td>
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<tr>
<td>2007</td>
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</table>
Membership Figures

The society’s membership grew from 246 in late 1967 and exceeded 2000 for the last several years. Individuals currently make up about 84% of the membership with institutional memberships constituting the balance. The total membership is 2,363 as of February 2006. Student members represent about 18% of the individual members (Refer to Appendix A, Table 1, Regional Membership Summary).

Demographics and Meeting Attendance

Historically, the society’s membership is primarily derived from the United States and Canada. Approximately 94% of the individual members are located in the U.S. and Canada (Canada has 6% of the membership). The remaining individual members come from Meso-America (<1%); the Caribbean (< 1%); South America (1%); Europe (4%); Australia and New Zealand (3%); and Africa, Asia, and the Middle East combined have less than 1%. The geographic distribution of the membership is further concentrated. Approximately 23% of the eastern U.S. members are found in the northeastern and mid-Atlantic states. The society’s Canadian members reflect a similar distribution. Approximately 59% of the membership is located in the eastern provinces, primarily Ontario and Quebec.

Meeting attendance tends to parallel the number and geographic distribution of society members. Conference registrants ranged from 62 in 1967 to 1,213 at the Washington D.C. meeting held in 1995. The meeting in Quebec had 1,137 registrants, the second highest number of attendees of any conference. It should be pointed out that at this meeting, some 26 countries were represented (100 persons attended this conference from countries other than the United States and Canada). Conference location significantly influences actual participation in the society’s meeting. Conferences held in cities (n=2) along the East Coast of the U.S. since 1990 had attendance ranging from approximately 882 to 1,213 individuals. The only Southeast meeting, held in Atlanta, had 1,031 registrants. By contrast, society meetings held west of the Mississippi or in the Midwest (Cincinnati) during the last decade reported attendance ranging between 570 to 82225 individuals. Conferences held outside the U.S. (Ottawa in 1977, Kingston in 1992, Vancouver in 1994, Quebec in 2000, and York in 2005) had attendance of 512, 819, 612, 1,137 and 987 respectively.

Conference Events and Activities

Meeting events and activities have varied during the history of the conference but, in recent years, many have become reasonably standardized functions in terms of schedule and structure. Each conference tends to have its own character because of host planning and local setting. The conference traditionally takes place during the first full week of January. The meetings usually begin on Wednesday and conclude no later than noon the following Sunday. Generally, the conference is organized around an opening plenary
session, a series of sessions or symposia in which papers are presented or discussions held, workshops, roundtable luncheons, the banquet, the Business Meeting, one or more receptions, and tours of local attractions. The presentation of awards is most often integrated with a plenary session, the banquet, or the Business Meeting. The Exhibits Center and various board, committee, and caucus meetings also are standard functions.

Papers and Sessions

The number of scheduled conference papers has averaged 377 since 1990. In this decade, the number ranged from a high of 550 in Quebec to a low of 210 in Tucson. The number of sessions has steadily increased from a low of 34 to a high of 75. For a breakdown of the sessions and papers by conference refer to Table 3 above.

Costs and Fees

General conference costs have increased to a high of $165 for preregistered members. Hotel rates have ranged from $50 to $139 for a single/double before taxes (refer to Table 3 above). Rates vary due to location, amenities, and advance conference planning. Additional costs can be expected for factors such as historic register properties or other similar amenities that are supported by the society.

To encourage preregistration and membership in the SHA, since 1993 the rates for nonmembers and late registrants has been set substantially higher than that for preregistered members. Refer to the discussion on conference fees, and Tables 4 and 5 in Chapter IV. Preregistration is running about 80% to 90% of total attendees.

Event costs associated with the conference have remained relatively constant in recent years. The annual banquet usually costs about $45.00 per ticket. Roundtable lunches varied from the mid-teens to $25.00. Tours have been offered at fees ranging from $8.00 to $75.00, prices that are dependent on the length of the tour, entry fees, and food service.

Conference Format

Sessions

Plenary, symposia, and contributed paper sessions form the basis of the meeting. Six to eight concurrent sessions normally are scheduled during the morning and afternoon on Thursday, Friday, and Saturday. The number of sessions depends on the number of proposed presentations and topic diversity. An opening or plenary session may be planned either as a Wednesday evening or Thursday morning event. Other sessions may be scheduled during the evening if necessary. The Quebec meeting had 12 concurrent sessions daily.
Administrative Services

A series of administrative or service functions are part of the conference. A registration desk is maintained during most of the meeting. Traditionally, registration opens Tuesday afternoon and operates during the day on Wednesday, Thursday and Friday, and for a half day on Saturday (longer if tours and other functions are scheduled on the last day of the conference). Depending on the schedule of preconference workshops, it may be advisable to have an earlier opening of registration to accommodate workshop attendees. An exhibits room (SHA Bookroom) is open to attendees Thursday morning until Saturday afternoon. The displays and exhibits are set up on Wednesday and normally dismantled on Saturday afternoon. A Speaker Ready room and an Employment Center normally are maintained during the day from Thursday morning until Saturday afternoon. An office or administrative center is established for use by the conference staff and Headquarters Staff throughout the meeting.

Catered Functions and Receptions

Catered functions and receptions are traditional events of the conference.

- The *annual awards banquet* is held on Friday evening. This function is normally scheduled at the conference hotel, but may be planned elsewhere.

- A variety of *roundtable luncheons* are scheduled for each meeting. Roundtable luncheon discussion groups of 10 to 12 individuals each may be planned for Thursday, Friday, or Saturday. The total number of roundtables and daily scheduling are matters to be determined by the Site Committee.

- The *Past President’s Luncheon* is a Thursday or Friday function that is held close to but outside of the hotel. This event is normally paid for by the attendees.

- Finally, *coffee service* normally is provided for the midmorning and mid-afternoon breaks Thursday through Saturday. This service may be provided optionally throughout the day rather than simply at breaks. Soft drinks, juices, and other refreshments may be offered, if the budget will bear the additional expense, or made available at a nearby hotel concession. Coffee service should not be viewed as a required amenity of the meeting. Instead, the cost of this service should be carefully weighed against the other needs in the conference budget and can be cut back or eliminated if dictated by financial considerations.

Receptions normally are scheduled for Wednesday and Friday evenings and optionally planned for Thursday and Saturday nights. These events may be held at or away from the conference facility and be organized as sponsored or no-host affairs. It is recommended that these social functions be planned either in or close to the conference facility given the extra cost of transportation and the difficult logistics of transporting large crowds. This is particularly true when bad winter weather could be a factor.
**Business and Committee Meetings**

Business and committee meetings of the society are standard events.

- The society’s annual business meeting is held late afternoon on Friday. No other functions or sessions can be scheduled at the same time as the business meeting.
- The SHA Board of Directors has its first meeting on Wednesday for the entire day. A second board meeting usually convenes on Saturday evening.
- The ACUA Board of Directors normally first meets throughout the day on Tuesday. A second meeting usually is held Friday late afternoon for up to 1.5 hours. This Friday meeting cannot conflict with the Business meeting or the Banquet. The Friday 3:00 PM to 4:30 PM timeframe usually satisfies these requirements.
- Various committees of the society and other groups meet annually at the conference. In 2006, a new format was offered. Committees meet on Friday from 3:00 PM – 4:30 PM except for the Nominations, Budget, Awards and the Editorial Advisory Committees which meet at their agreed upon times. Each committee met in the same meeting room and are assigned to a round table. Preferably, two time slots can be offered for committee meetings (3:00PM-3:45PM and 3:45PM – 4:30PM) so that members who are in multiple committees can meet at the different times. No paper presentations or special events should conflict with the committee meetings. The annual business meeting would follow the committee meetings in the same room and same setup.
- In previous years, the following schedule was one that seemed to suit most of the requirements of the various committee chairs. The Conference Committee Director, if appointed, or in the absence of this position, the Local Arrangements Chair, is to coordinate with the SHA President and the various committee chairs to determine if variances are needed. Only two committee meetings currently have food service at their meetings due to the fact that they are scheduled early in the morning. Refer to the section on Conference Expenses for detailed information. It is best to contact each committee chair to confirm their meeting times.

### Tuesday
- 7:00 AM–8:00 AM Development Committee
- 8:00 AM–5:00 PM ACUA Board of Directors

### Wednesday
- 8:30 AM–5:00 PM SHA Board of Directors

### Thursday
- 7:00 AM–8:30 AM Editorial Advisory Committee
- 7:30 AM–9:00 AM Gender and Minority Affairs Committee
- 12:00 PM – 1:00 PM Membership Committee
- 1:00 PM–2:30 PM ACRA (if requested)
- 4:00 PM–5:00 PM Awards Committee
- 5:00 PM–6:00 PM SHA Conference Committee

### Friday
- 7:00 AM–8:30 AM Newsletter Editorial Advisory Committee
- 7:00 AM–8:30 AM Student Subcommittee of the Academic and Professional Advisory Committee
- 8:00 AM–9:00 AM Public Education and Interpretation Committee
- 8:30 AM–12:00 PM Register of Professional Archaeologists Board (if requested)
- 2:00 PM–4:00 PM Budget Committee
- 3:00 PM–4:30 PM ACUA Board of Directors
- 4:30 PM–6:00 PM SHA Business Meeting
**Workshops and Caucuses**

Meetings and workshops of specialized interest groups and SHA Continuing Education Workshops have become increasingly common in recent years. Meetings or workshops of groups such as the Government Maritime Forum, the Urban Archaeology Forum, the Military Sites Forum, and the Register of Professional Archaeologists normally convene at times that do not conflict with principal program functions or events. Refer to the above schedule for some of the days and times allotted to these groups. Such nonprogrammatic events usually are scheduled throughout Wednesday, late afternoon or evening Thursday, or late afternoon Saturday. Due to the growing interest in continuing education workshops and other events, at least 4-6 small and medium-sized meeting rooms will likely be needed for Tuesday and Wednesday.

Workshops that include fees other than those conducted by the SHA as Continuing Education Workshops are to be approved in advance by the SHA Board. The revenue and expenses associated with the Continuing Education Workshops are not part of the conference budget. The fees for the SHA Continuing Education Workshops are set by the SHA Continuing Education Coordinator in consultation with the SHA Treasurer. The SHA Continuing Education Coordinator determines the number and content of the SHA Continuing Education Workshops.

The Conference Chair and Local Arrangements Chair, through the Headquarters Staff, is to be informed of the dates, times, and locations of such events so that they can be announced in the program and so that sufficient space for the event is coordinated with other conference activities. See duties and responsibilities of the Site Committee in Table 1.

**Tours**

Organized tours of local historic properties, museums, or other attractions are planned in conjunction with the conference. Tours normally are scheduled for before or after the conference, on Wednesday or Sunday. Tours are planned to offer conference attendees the widest opportunity to visit local resources. Tours may also be useful for conference sites located outside of historic urban areas where conference visitors are more likely to want a chance to see something of the local community. Such tours generally are of short
duration and are scheduled, as much as possible, to avoid conflict with major program elements. No tour is to conflict with the business meeting or presentation of awards.

GENERAL PLANNING OVERVIEW

Conference planning begins when an individual or group expresses interest in hosting an annual meeting. A representative should contact the Conference Coordinator about meeting requirements, scheduling, proposal preparation, and other responsibilities. The Conference Coordinator will provide information and general guidelines related to conference planning.

Normally, the society entertains proposals four years in advance of a meeting date. Prospective conference hosts must prepare a proposal for submission to the society’s Board of Directors (Section II for details on the format and content of the proposal and the proposal evaluation process). The board usually makes a decision on a meeting proposal within six to nine months of receipt.

Following acceptance of a proposal by the Board, meeting organizers, in cooperation with the Conference Chair, should formalize the Site Committee (Table 1). Hotel negotiations should be completed by the Headquarters Staff as soon as possible (Section III). Refer to the end of Section IV for information on deadlines. Table 7 following that subsection provides a timeline for conference activities and associated deadlines. Frequent referral to Table 7 should be made so that it can serve as a reminder so that key deadlines are met.

The year before the conference has many critical deadlines that affect conference success. Program and registration information are critical to informing the SHA membership and other potential attendees. Deviation from these established deadlines or inadequate meeting information will detrimentally affect the quality of the conference and attendance. Problems that crop-up have to be dealt with immediately and committee cooperation is critical. Program elements, space issues, catering, audiovisual equipment, volunteers, and printing are critical elements.

Following the meeting, a detailed conference report is required. The report is necessary to document the meeting for the SHA. It also serves as an important planning aid for future conference organizers. Section VIII contains information on the content and format of this report.
II. THE PROPOSAL

INTRODUCTION

Anyone reading this section for guidance has already performed the first step in preparing a proposal to host an SHA conference: you have expressed interest in hosting an annual conference to the Conference Coordinator. Individuals already will have considered the benefits to the society, the discipline, their institutions, and themselves in hosting a conference. Obligations, however, also are inherent. The principals must be willing to work hard and follow through over a period of years. Host and sponsoring institutions must commit to maintaining their support throughout the course of planning and conducting the conference. Successful conference planning depends on the knowledge, skill, and dedication of the principals. The Conference Chair is ultimately responsible for the meeting and must have strong leadership and organizational capabilities. He or she must assemble a skilled, dedicated committee; and must be able to construct and follow a detailed conference budget. Imagination and a sense of humor through this process will be necessary.

PURPOSE

The policy of requiring a proposal from groups interested in sponsoring the society’s annual conference was established in the late 1980s. The policy is meant to:

1. Encourage potential host groups to consider the many facets of conference planning as early and in as much detail as possible;

2. Enhance competition among potential conference hotels within a community and between prospective venues to achieve the most cost-effective meeting possible; and

3. Allow the board to evaluate a conference venue and associated conference planning based on standard criteria.

This section is designed to aid individuals or groups who want to sponsor the society’s annual conference in the preparation of the proposal. In effect, this chapter should be viewed as a “Request for Proposal.”

Three topics are discussed below: Feasibility, Preparation and Submission, and Review and Selection. Each topic provides comments on organizational, planning, and administrative elements that should aid prospective site committees in drafting a proposal. To avoid as much duplication as possible in the Conference Manual, reference is made to other sections and materials.
FEASIBILITY

There are two preliminary and essential tasks that must be completed before drafting a conference proposal. These include: 1) organizing the prospective Site Committee by identifying key members and institutional support; and 2) surveying the host city to evaluate its potential as a conference venue.

Site Committee

Organization

The first task that must be accomplished is organizing a Site Committee. Initially this committee should include personnel key to conference planning. Such individuals must accept responsibilities and duties that extend over a period of up to four years. Minimally, key members should include: Conference Chair, Local Arrangements Chair, and Program Chair. (see Table 1 for duties and responsibilities). Planning and administration of a quality conference is directly related to the early organization and effective integration of key personnel into a team. All key Site Committee positions (Table 1) must be filled within six months of the date that the proposal is accepted by the SHA Board. All remaining supervisory positions should be designated no later than one year before the meeting. For the key positions as noted above, individuals may not serve in more than one capacity due to the time commitment and responsibilities involved. Further, it is recommended that the same person share none of the other positions.

Institutional Support

A crucial element in the formation of a Site Committee is securing institutional support. Institutional support operates at several levels. The first, normally, is that an organization commits to serving as the official host or co-host of the conference. Generally, one or more of the key Site Committee staff are employed by the organization, which has determined, usually through the persuasive arguments of the prospective meeting organizers, that such action will benefit its program or agenda in the public, private, or academic sectors. Host institutions commit to supporting the meeting through both direct and in-kind services, e.g., release time for involved personnel; leave and travel for key individuals; administrative support; public relations assistance; etc. A second form of institutional support is provided by organizations that permit its employee(s) to participate on a Site Committee, but commit little if any other resources to the meeting. Conferences are expected to be self-supporting events.

A third level of institutional support is derived from grants-in-aid. Historically, such support has been obtained from a variety of public and private sector organizations at the local, state, and national levels. Cash contributions or donated goods and services are typical grants-in-aid. Historically, both types have been used to wholly fund, supplement costs, or sponsor various administrative activities, social events, or scholarly functions. As examples, banquet costs at the Charleston conference were covered by grants from two
private foundations; in Richmond, costs associated with the Civil War Public Program were funded by grants; in Jamaica, the receptions were sponsored by the government or the conference hotels, and support for students was funded by grants from private firms; and for the 1998 and 1999 meetings in Atlanta and Salt Lake City, respectively, grants supported the public sessions. Grants received in cash are have to sent directly to the Headquarters Staff for use at the conference.

**Venue Survey**

During the venue survey, the ability of the potential host locale to support a cost-effective meeting is assessed. At a minimum, the following resources must be considered: hotels, transportation, restaurants, local attractions, and nearby tour opportunities.

**Hotels**

Historically, the society holds its conferences in a hotel that provides all necessary space. Traditionally, the hotel is located in the business district. Frequently, the facility is in or near the principal historic district of the community. Centrally located hotels are favored because they normally are sited within comfortable walking distance of dining establishments, shopping areas, and cultural attractions. Isolated conference hotels or resorts are not viewed as favorably because they restrict attendees’ choices regarding meals and social outings; however, if these facilities are in an adjacent or connected business tower or mall, this concern in minimized. Incidental costs generally are higher than comparable, centrally located facilities. In large metropolitan areas, it may not be feasible to hold the meeting in the central business district due to room costs; however, the chosen location should be one that meets the noted parameters.

A minimum of two hotels that meet the basic requirements for hosting the conference should be identified. Two are recommended to ensure competitive negotiations for room rates, function space, and other amenities. Hotel room and function space requirements are identified and discussed in Section III, *The Hotel.*

Likely hotels normally are identified with the aid of the local Convention Bureau or Chamber of Commerce and national sales office representatives. The Headquarters staff can prepare a hotel Request for Proposal and distribute it to those that appear to meet the society’s conference requirements. The following information will be required to obtain a *preliminary* hotel proposal:

- Proposed meeting dates (including alternates)
- Anticipated number of attendees
- Likely number of required guest rooms (conservatively estimated)
- Number and size of break-outs (meeting rooms) required
- Type and size of administrative and special function space
- Anticipated room rate(s) and complimentary room ratio (conservatively estimated)
• Deadline for submission of the hotel’s proposal
• Name, address, and telephone number of the committee contact (usually the Conference Chair) and the Headquarters staff

Hotel proposals should be received early enough to allow the committee to include an initial evaluation of prospective hotels in its proposal.

Transportation

Transportation is an important consideration in evaluating a venue. The different types of transportation serving the community should be reviewed and evaluated. Most attendees travel to the conference by air. The number of scheduled flights serving the site and fares likely will significantly affect attendance. Alternate means of travel to the meeting should also be considered. Conference sites, particularly in the mid-Atlantic and northeastern United States, may benefit greatly by individuals traveling to the meeting by train or auto. Weather also should be factored into travel considerations. Travel modes and schedules may be significantly affected by the January meeting date.

Transportation within and about the community also should be evaluated. Public transportation, schedules, and fares to and from the airport or other terminals or depots should be investigated. Rapid transit and bus routes servicing the area should be reviewed. Taxi rates for travel around the city should also be considered.

The Site Committee must realistically consider travel expenses. If travel costs to and about the prospective host city are expensive, even if hotel rates are acceptable, attendance likely will be poor. High travel costs also may eliminate or greatly restrict the participation of entire segments of the society, such as students and entry-level professionals. As a rule of thumb, advance-purchase tickets for travel between major cities around the United States and the venue should average below $500, based on advance purchase. Obviously, this threshold is dependent on whether the conference is located in North America or abroad, given the society’s interest in becoming more of an international organization. It may be feasible to organize charter flights at group discounts from a few major locations to international venues to keep costs attractive.

Dining and Cultural Amenities

The prospective conference venue should be surveyed to determine the range and diversity of establishments and attractions that provide amenities for conference attendees. Dining establishments at or within walking distance of likely conference hotels should be surveyed to learn price and menu range. Delis, cafes, and restaurants offering moderately priced breakfast and lunch menus are desirable in that they provide attendees with options to reduce meal costs. The range, quality, cost, and ethnic diversity of evening dining and drinking establishments at the hotel(s) or within 10 to 15 minutes by taxi also should be reviewed to provide participants with a variety of dinner options. Establishments emphasizing local cuisine, historic/unique dining opportunities, or ethnic specialties are often favored by conferees.
Museums, galleries, historic properties/districts, and unusual shopping opportunities situated near potential conference hotels should be identified. A variety of possible reception sites at local museums, historical societies, landmarks, aquariums, or hotels should be identified and considered. Possible tours of local attractions should be surveyed and evaluated in terms of their proximity to the conference site and their potential interest to meeting attendees.

*International Meetings*

One of the society’s goals is to become more of an international organization. In this regard, a goal of having the conference at a non-U.S. location at least every five years has been set by the current Conference Committee. The success of the Jamaica, Vancouver, Quebec, and York meetings testify to the membership support of this goal. Meetings abroad require attention to additional considerations:

- Bilingual language presentations and programs
- Other requirements related to cultural traditions and legal requirements
- Publication of information in printed and electronic conference advertisements and programs concerning visa and other customs requirements
- The cost and added delays of mailing conference materials
- Potential other costs for telephone and other communication costs, although web sites and email can serve to reduce this expense
- Transportation costs

These considerations are not impediments. They are mentioned to ensure that the conference is organized and successful.

**PREPARATION AND SUBMISSION**

**Preparation**

Conference proposals must be drafted and assembled in a professional manner. Style should follow that normally employed or accepted in the field.

Preparation of the proposal must be coordinated with the Conference Coordinator and Headquarters staff. This individual will, upon request, provide examples of previous proposals and other information that may assist and expedite preparation of the document. Potential conference organizers also are strongly encouraged to contact the principal chairs of recent society meetings to gather information and insights on meeting planning and administration.

All sections of this manual should be thoroughly reviewed before drafting the proposal. This action will ensure that the many facets of conference planning are considered in the preparation of the proposal.
The proposal should include, but is not limited to the following:

- An introduction listing the name(s) of the proposed host institution(s) and other organizations supporting the proposed conference
- A section on the proposed theme of the conference
- A short description of the proposed conference city, its history, and its relevance to the mission of the society
- A description of the proposed Site Committee, its members, and their duties
- A proposed schedule
- A preliminary evaluation of possible conference hotels
- A description of available transportation services and relevant costs
- Information about dining establishments and local cultural amenities
- A description of the special events and tours planned or under consideration
- A proposed conference budget

Figures, tables, and maps should be employed as needed. Appendices may be appropriate and may include material such as letters of endorsement, copies of preliminary hotel proposals, and tourist information.

Submission

The SHA Board acts on conference proposals at its annual and mid-year (usually May) meetings. A complete draft, however, must first be submitted to the Conference Coordinator for review and comment no later than 60 days before the annual or mid-year meeting in order to be considered. For consideration at the annual meeting, the proposal must be submitted by 1 November. Dates vary for the mid-year meeting, so be sure to ascertain when proposals for that meeting will need to be submitted.

Prospective Conference Chairs and their key staff are invited and strongly encouraged to make an oral presentation of their proposal before the Board. Such presentations will be limited, under normal circumstances, to 20 minutes. Meeting proposal presentations will be arranged and scheduled by the Conference Coordinator.

EVALUATION AND SELECTION

Evaluation

Proposals are evaluated on the following elements:

1. Personnel and institutional support
   - Site Committee organization
   - Host(s) and supporting institutions
   - Grants-in-aid
2. Conference venue
   • Location
   • Transportation services
   • Hotel(s)
   • Amenities

3. Program and administrative functions
   • Thematic conceptualization
   • Function/event planning and scheduling

4. Budget
   • Income
   • Expenditures

Proposals are evaluated in two phases. First, the Conference Coordinator reviews the final draft of a proposal and prepares a recommendation to the board. Whenever possible, objective criteria are used to develop rating scales. Obviously, costs are the most easily scaled. Second, each board member reviews the proposal and associated recommendations. Any questions, concerns, or comments regarding a proposed conference are brought before the Board and openly discussed.

Selection

A word of encouragement: Once a conference proposal has been submitted, few are rejected. The board may accept a proposal as submitted. Because of any number of factors, it may conditionally accept a proposal pending resolution of an issue. The most common reason for this action is to complete hotel negotiations. The board also may table a proposal to resolve, for example, a scheduling or location conflict between future meetings. If a proposal is conditionally accepted or tabled, the board normally acts on such proposals at the next meeting session. Whatever action the board takes, its commitment to a prospective venue is not final until a hotel contract is signed. The Conference Coordinator will notify the prospective Conference Chair of any action taken by the Board.
III. THE HOTEL

INTRODUCTION

This section is designed to acquaint prospective meeting organizers with conference hotel requirements and the negotiation process. The “Conference Facility” section comments on hotel criteria. The “Negotiations” segment outlines the individuals, procedures, and processes involved in hotel agreements.

CONFERENCE FACILITY

Introduction

The conference hotel is central to planning and organizing the annual conference. The establishment must meet the society’s needs for both guest rooms and meeting space. The discussion below is subdivided into the following areas: Location and Amenities; Guest Room Accommodations; and Space and Function Criteria.

Location and Amenities

The significance of hotel location was previously discussed under “Venue Survey” in Section II. To briefly reiterate, the conference hotel should be sited within comfortable walking distance of dining establishments, shopping areas, and cultural attractions. At some recent meetings, the conference hotel has been connected to malls with food courts; this provides a variety of close-by eateries that are easily accessible even in inclement weather. Location in or near a historic district is a distinct advantage. The hotel should be near public transportation services. Regularly scheduled airport shuttles and nearby parking garages are desirable conveniences. Proximity to additional hotels, with comparable or lesser rate structure, should also be considered to provide overflow accommodations should the conference hotel room block be exceeded. For conferences held outside “downtown,” proximity to mass transit stations should also be considered as a means of allowing attendees to see the host city cheaply and conveniently.

Since attendees will spend most of their time in the hotel, facilities must be sufficient to accommodate their needs. Adequate public space, such as a well-appointed lobby, is an important consideration for quiet conversation and informal meetings. Seating convenient to session rooms is also desirable.

The hotel should have several restaurants with varying menus and prices. At least one of these establishments should be a coffee shop that is open from early morning to late evening. Hotel restaurants serving breakfast and lunch must be able to seat and rapidly
serve large numbers of conferees, particularly if there are few alternative eating establishments within a very short walking distance of the hotel. Hotel sales and catering managers must be informed that the daily conference schedule provides only short periods for meals. Organizers should request information about how the hotel will coordinate its meal service with the meeting schedules. Frequently, hotels will offer to set up continental breakfast stations and luncheon buffets during the meetings to provide time-sensitive dining and menu alternatives. Hotels may be willing to establish satellite food service areas during breakfast and lunch to meet the anticipated demand—the Atlanta conference hotel established a commons area with tables and chairs, and sold pastries, bagels, fruit, juice, etc. during breakfast, and for lunch served sandwiches, snacks, and soft drinks. This arrangement was very successful because it allowed conference attendees to grab a quick and affordable meal, and also provided a gathering place with tables and chairs where conferees could meet.

Several bars and lounges, with a combined capacity to seat most of the attendees, should be present. Hotel sales representatives should be apprised that, unlike many conventions, SHA conference attendees do not disperse in the late afternoon and evening. Rather, they congregate to socialize, particularly in the bars and lounges. Satellite bars may be established to serve the conference need. Management must be informed that additional bartenders, servers and supplies, primarily beer, will be required beginning late afternoon Wednesday. It is worth noting that the Richmond hotel bars served approximately 283 cases of beer, 151 domestic and 132 imported, during the meeting. Hotel bartenders in Kansas City reported that conferees consumed as many barrels of draft beer in one night as they normally served in a week. In Jamaica, hotel food/beverage managers, however, were dismayed at the low consumption of beer by conference attendees. The historic pattern of high per capita beer consumption apparently was altered by the availability of free or inexpensive liquor in Kingston. The SHA meeting consistently consumes more beer than other conferences a hotel may host, and hotels need to be aware of these patterns of consumption in order to assure that the hotel is not drunk dry—a certifiable disaster for any conference. With the popularity of microbrewed beer, it is important that hotels be aware that this type of beer may be a preference. Hotels share these data with each other and it is suggested that the proposed conference hotels be asked to contact former venues.

The hotel also should have one or more shops where personal needs, gifts, or sundries may be purchased. Increasingly, attendees use hotel fitness centers. Pools, saunas, and health club facilities are positive features favoring an establishment.

**Guest Room Accommodations**

The conference hotel must be able to provide room accommodations for attendees. In recent years, excepting Jamaica, a block of about 250–275 rooms has been occupied by conferees on Thursday and Friday nights. Approximately 200–235 and 185–200 rooms were used on Wednesday and Saturday nights, respectively. Therefore, any hotel considered as a convention facility must have a block of about 275–300 rooms available. Flexibility in the size of the room block may be necessary depending on the availability.
and cost of overflow accommodations. (This figure may vary somewhat depending on the
venue, the location [in the U.S., usually East Coast meetings are much more heavily
attended than meetings in the Midwest and West] and estimated attendance).

Generally hotels with this size room block and the required meeting space will be
characterized by a minimum of 500–600 guest rooms. Occasionally, adjacent hotels are
considered in order to obtain all the rooms and meeting space needed, but this practice is
discouraged since the meeting tends to lose the cohesiveness that has been a hallmark of
the SHA conferences. It has been a recent trend to need more rooms on Tuesday so that
registrants can attend the workshops and pre-conference tours or arrive in advance of the
Wednesday committee meetings.

All guest rooms and suites must be clean, neat, well appointed, and secure. Most hotels
now offer standard rooms, VIP accommodations, parlor, and full or “presidential” suites.
Standard guest rooms contain a bath and normally either a single king or queen bed, or two
double or queen beds. Occasionally, establishments offer rooms with twin beds. Usual
minimum appointments include a bureau, desk or table and chairs, telephone, and a color
television. Other amenities may be present depending on the quality of the hotel. Since
more of our members are bringing notebook computers to meetings, data ports and other
computer-related amenities are important.

VIP accommodations do not differ markedly in layout and content from standard rooms.
VIP rooms normally are located on concierge or secure levels and are characterized by
such amenities as a refrigerator, honor-bar, turndown service, free newspaper,
complimentary continental breakfast, and late afternoon and evening cocktail service.
Most major hotels also have a number of small, usually two-room, parlor suites. They
consist of a bedroom with bath and a parlor with partial bath. Fixtures and amenities
usually are upgraded somewhat from standard and VIP rooms. The parlor normally is
furnished with chairs, a small couch, a coffee or end tables, desk or table and chairs,
phone(s), television, refrigerator, and, frequently, wet-bar. Occasionally, parlor suites
connect with small conference rooms or reception areas that may be optionally used. All
conference hotels maintain several full or “presidential” suites. These usually are multi-
bedroom complexes with or connected to rooms for entertainment or business purposes.
All fixtures and amenities described above are present and usually significantly upgraded.

The society requires only standard rooms for meeting attendees and one suite for the
President. The President’s suite must be reserved from Monday through Sunday nights. A
parlor suite, which includes or is connected to a conference area, provides the required
accommodations for the President and the most cost-effective arrangement for meeting
organizers.

**Space and Function Criteria**

Proper meeting and function space is critical to creating a conference environment that
promotes interaction and encourages attendance. The different events and functions of the
annual meeting require varied hotel space and service. The following section identifies
and comments on the programmatic, administrative, and social functions and associated space and service requirements.

The hotel is required to provide all necessary meeting space free of charge. (As a caveat, hotel proposals or contracts may contain a clause(s) listing meeting space charges based on room block figures [see “Negotiations” section]). All meeting space must be guaranteed on a 24-hour basis for the duration of the conference and be secured when not in use. Most hotels feature rooms that can be subdivided into smaller meeting areas referred to as “breakouts.” The conference hotel contract will specify which rooms the conference has on which days. As hotels may host more than one conference at a time, rooms not specified in the hotel contract cannot be counted on for meeting space. When negotiating meeting space, the Headquarters Staff should have a firm idea of the number of sessions the Conference Committee plans to present each day, and the number of spaces it will require. It is wise to attempt to negotiate for one or two more spaces than may actually be required. The available meeting spaces and their capacities form the basic structure of the program, and the Program Chair should be vigilant to only accept and schedule as many sessions as can fit to available hotel space on any given day.

Readers should refer to Section V for information about integrating and scheduling the following events and functions into a conference agenda or program.

Meeting Space and Functions

Plenary Sessions

Plenary sessions are held in a large breakout room or auditorium. Such sessions are intended for all conferees and should not be scheduled against other events. Seating capacity should be planned for at least 75% of the anticipated registration. The plenary break-out area is to be set up with theater-style seating with center and side aisles; a podium with a microphone; and water service at the speaker’s rostrum and in the rear of the room for conferees. Seating arrangements for speakers and audio visual or other equipment needs are to be arranged as necessary. Plenary sessions usually are scheduled on Wednesday evening or Thursday morning.

Public Sessions

The Public Session is a relatively recent addition to the conference program. Public education is part of the professional responsibility of the society and its professional membership. The SHA Public Education and Interpretation Committee is responsible for planning this session with the local committee. Refer to Appendix E for the Public Session Guidelines.

Usually, the Public Session is planned to be of interest to both children and adults. Programs have included hands-on activities, as well as presentations, videos, and other media. As a result, the space needed for the Public Session is dependent on the content of the program. Further, this session is normally held on Saturday afternoon so that the
public can easily attend. Local societies are often instrumental in helping with this session. They have helped with advertising the conference and the public session, setting up the activities, and assisting with registration and information. Local grants are often obtained to help defray the cost of the Public Session. For grant guidelines, refer to Appendix F.

**Meeting Rooms**

Eight to fifteen rooms or breakouts normally are required for concurrent paper sessions and symposia. Ideally, each room should comfortably seat 120–200 people theater-style with center and side aisles. Such space is seldom available in one conference facility. Usually, meeting hotels offer four to six rooms or breakouts that seat 90–150 individuals, and two to four locations that can accommodate about 150–250. Conference organizers must critically evaluate the estimated number of total registrants, potential session attendance, and scheduling when faced with a number of meeting rooms/break-outs that vary significantly in seating capacity or that are only marginally acceptable.

Meeting rooms normally are scheduled for use Thursday morning through Saturday afternoon. A variety of rooms may also be needed for Wednesday SHA-sponsored workshops; the number and size of these rooms are to be coordinated by the Headquarters Staff with the SHA Continuing Education Coordinator. The SHA workshops normally require four to five rooms for Tuesday; each of these rooms needs to accommodate 40 persons in classroom style. Occasionally, evening and Sunday morning workshop sessions are planned, but these are not encouraged.

Each meeting room setup is to include appropriate seating, as noted above; a podium and microphone; and water service on the speakers’ platform and in the rear for conferees. Panel seating for symposia speakers and discussants must be planned in advance. Every meeting room is to be furnished with LCD projectors (for Powerpoint presentations) and screens. Laptop computers will not be supplied, and symposia organizers are encouraged to provide laptops for their sessions. Additional audiovisual equipment such as slide projectors, overhead projectors, and VCR equipment must be provided by the presenter who needs the equipment. Audiovisual equipment service normally is a function separate from room setup.

**Poster Session**

Posters have been underutilized as a means of communicating research results at SHA conferences, probably because so few papers have ever been rejected for presentation. The conference organizers should emphasize the unique advantages that posters have over traditional papers and encourage greater participation. Poster presentations are displayed on standard bulletin boards. A small session, those with fewer than five participants, may be integrated with the Exhibits Center displays. A session with more than four presenters should be scheduled for a room near the Exhibits Center or a convenient to the session rooms. Organizers should plan for a large session and identify space where 10–20 bulletin boards may be arranged and viewed throughout the meeting.
Layout and Break Area

Meeting rooms should be located in close proximity to one another to facilitate movement between and among sessions. The majority of the conference rooms also should open on or lie near a large foyer that can serve as a break and social area. Restrooms must be conveniently located nearby.

Administrative Functions

Business Meeting

The SHA holds its annual business meeting at the conference. Space must be scheduled and reserved for this function. Setup includes theater-style seating for 30% of the estimated number of registrants arranged with at least two aisles; a raised dais with skirted tables and panel seating for 18; a podium equipped with a light and microphone; microphones and stands in two locations for floor speakers if the room is large; and water service on the head table and on a table(s) in the rear of the function space. The business meeting is held late afternoon or evening on Friday. Be sure to allow hotel staff sufficient time to set up the room. If a breakout room must be used or adapted, the last session of the afternoon should be scheduled to end well before the business meeting begins. If timing is close, the session chair must be warned to vacate the room promptly. Another option would be to hold the Business Meeting after the committee meetings on Friday afternoon. No setup change is necessary. No functions or sessions should be held at the same time as the business meeting.

Board and Committee Meetings

The SHA board, the ACUA, and various standing and presidential committees of the society convene on one or more occasions at the annual meeting. Refer to Chapter 1 and the section dealing with business and committee meetings. One or more conference rooms need to be identified and reserved from Tuesday morning through Saturday night. Other groups wishing to avail themselves of such space should contact the Site Committee at least 30 days before the program printing deadline, usually 1 December, in order to be included on the schedule of events. Most conference hotels maintain a boardroom for just such use, or a small meeting room can be set up conference-style. Setup should include a table with conference seating for 20 unless otherwise directed. Approximately 10 additional chairs should be spaced along one or more walls as seats for guests. A skirted table should be present to hold water and coffee service. Water service is provided without charge for scheduled meetings. In 2006, an alternative setup was adopted. All committees except for Nominations, Awards, Budget and Editorial Advisory Committee. Preferably, two time slots can be offered for committee meetings (3:00PM-3:45PM and 3:45PM – 4:30PM) so that members who are in multiple committees can meet at the different times. The room would be setup in rounds so that each committee would be assigned to a table. No paper presentations or special events should conflict with the committee meetings. The annual business meeting would follow the committee meetings in the same room and same setup.
Workshops and Caucuses

Various special interest groups and SHA Continuing Education Workshops (see Meeting Rooms above) likely will request space to meet during the conference. Refer to Chapter I for additional information. Normally such groups meet at times that do not conflict with programmatic events. Consequently, reserved, suitable meeting or conference space usually can be allocated these groups. Meeting organizers should anticipate and plan to accommodate space requests from special interest groups; however, last minute requests may not be able to be accommodated, but conference organizers need to be flexible and graciously attempt to satisfy reasonable requests.

Service Functions

Exhibits Center (Bookroom)

Besides being a revenue and cost item of the conference, the primary purpose of the exhibits center, also known as the Bookroom, is the dissemination of information. A room or breakout area of at least 4,000 square feet is required. The room must have controlled access and be securely locked each night. Electrical outlets should be numerous and located throughout the space. Skirted tables are arranged around the perimeter and in rows through the center of the room. A minimum of 40 display tables (2.5 x 6 ft. each) is required. Book displays and exhibits are set up Wednesday and removed Saturday afternoon. Well in advance of the conference, the Headquarters Staff should also provide information to the hotel on any special needs (phone lines, etc.) that particular exhibitors may need. All electrical and phone connection charges are the responsibility of the exhibitor.

The Headquarters Staff in coordination with the conference chair and the SHA Board set the fees charged to exhibitors. The rates set should be commensurate with those charged by other similarly-sized professional conferences (with between 800 to 1,200 attendees), and be more than sufficient to cover the cost charged to the conference by the hotel for the space, the tables and covers/skirts, and the special electrical and telephone hookups. Fees of $500/table should be considered for larger exhibitors, with lesser fees for tables that are not manned but just contain order information, or other materials of interest to attendees. Exhibitors with multiple tables should be offered a reasonable discount per extra table. Each exhibitor should be offered a conference registration as a part of their table fee.

Registration Center

A registration center is required for the annual conference. Ideally this operation will be established in a room or alcove designed or easily adapted for such use. Close proximity to the Exhibits Center/Bookroom is very desirable. Preferably the registration center will be a counter-type, alcove arrangement that can be closed and locked at night. Being able to secure the registration area when not in operation eliminates the need to take it down and store materials and reset them up the following day—a task that is very time consuming at the beginning and end of a usually exhausting schedule. In lieu of that, the
hotel may provide rollaway counter that can be secured after hours. The only other option is setting up tables in a common area, which will require substantial set-up and take-down time each day.

The center should be equipped with necessary office furnishings such as tables and chairs, sufficient outlets to power computers and printers, and telephones. The Headquarters Staff will need to make arrangements for the necessary supplies (file folders, stapler, trash cans, etc.) Access to a copier is desirable and this service usually is available from the hotel business or concierge desk.

The operations schedule of the registration center is from Tuesday afternoon to accommodate workshop participants through Saturday noon. The initial setup should begin no later than very early Tuesday morning since several hours will be needed to setup the prepared registration packets, the computers, and other equipment, and to be sure that all is in working order. As a courtesy, the registration packets for those officers and directors of the SHA Board who have preregistered should be delivered to their meeting area prior to the start of their Wednesday meeting.

**Conference Office**

Space should be identified and reserved for use as a conference office. This office will function as the Headquarters Staff and conference staff operations center during the meeting. Many hotels maintain a lightly equipped office for this purpose. A small meeting room, or even a convenient guest room, can be adapted for use if need be. Ideally this facility will be located near the registration center. The conference office should be equipped with desks/tables and chairs, a small filing cabinet, and telephone. Entry doors must contain locks. The conference office should be scheduled for use at least Monday through Sunday.

**Employment Center**

A small room, approximately the size of a standard guest room, must be identified and reserved for use as the employment center. Setup should include one or two skirted tables for display materials, several small tables with chairs to be used for interviews, and wall- or easel-mounted bulletin boards. Ideally the employment center is situated near the exhibits center or convenient to the meeting space. The center operates and should be scheduled Thursday morning through Saturday afternoon. The location of the employment center should be printed in the program.

**Food/Beverage (Catering) Functions**

**Banquet**

The society’s annual banquet normally is held at the conference hotel on Friday evening. While not a requirement, holding the banquet at the conference facility is more convenient for planners and provides considerable leverage when negotiating with the hotel.
Furthermore, since the annual awards ceremony is typically held after the meal is cleared, holding the banquet at the hotel will allow more people to attend the presentations. Historically, banquet attendance ranges around 175-225. The hotel, therefore, must be able to seat and serve dinner for at least 300 attendees. Setup should include 30–40 rounds (round tables), depending on their size, and a head table equipped with a standing lectern and microphone. The Long Beach conference included the cost of the banquet in the registration fee—this was considered by many as unfair to students and resulting in poor student attendance. Additional problems that arose as a result of including the banquet costs in the registration costs at Long Beach indicate that this practice should not be repeated in the future. An experiment conducted at the York conference involved setting up a low-cost banquet for students at the same time as the regular conference banquet. That experiment was successful, and is an option that might be considered at future meetings.

If a speaker is planned, whatever additional equipment is required should be scheduled. Typically, a Harrington Medal presentation will include slides illustrating the recipient’s career, in which case a screen, LCD projector, and attendant will be needed. If entertainment is planned, space must be available for the presentation. Since the 1993 meeting in Kansas City, a dance has followed the banquet. Although not compulsory, if a dance is held, a stage and dance floor must be set up by the hotel in advance, preferably in an adjacent room. A cash bar should be available during and after the banquet. However, to maintain quiet during the awards ceremony, consideration should be give to having the cash bar suspend operation for this time period. No other official activities should be scheduled at the same time as the banquet, unless it is a student banquet as discussed above.

Roundtable Luncheons

Roundtable luncheon discussion groups normally are scheduled during the conference. The hotel therefore must be able to provide an area where 4-8 rounds, accommodating 10–12 each, can be set up for lunch. Rectangular tables are unacceptable for this function. The tables must be placed sufficiently far apart to allow comfortable discussion within a group. Roundtable luncheons may be scheduled on Thursday, Friday, or Saturday.

Similar setups for breakfast roundtables, starting around 7 AM, should be considered. Breakfast roundtables may help ease the scheduling of the number of total roundtables provided to attendees.

Past Presidents’ Luncheon

The Past Presidents’ Luncheon is a scheduled event of the annual conference. This function is traditionally held off-site at a convenient restaurant. A reserved private room, if available, is preferred to seating in a main dining room. A luncheon for approximately 20 will require scheduling. Organizers will need to coordinate location and meal options if the lunch is not to be ordered from a menu. The luncheon is traditionally scheduled for two hours on Thursday or Friday. In 1998, the past presidents agreed to forego the traditionally complimentary luncheon and recommended that the funds be reallocated to
support a student reception. Persons in attendance pay the cost for the Past President’s Luncheon. The Local Arrangements Chair coordinates with the Headquarters staff to extend invitations to this event. The Past President going off of the board at this meeting is not extended an invitation.

Receptions

Two receptions usually are held at the conference hotel. An opening reception occurs Wednesday evening and another on Friday night before the banquet. The Past Presidents’ Student Reception is also typically held in the hotel, either immediately before the Wednesday night open reception or early Thursday evening before any special reception held outside the hotel. If receptions are planned in the hotel, the establishment should provide function space to accommodate the majority of attendees. These receptions normally are cash bar affairs. Local beers and wines are generally the best sellers at these cash bars. Hotel sales staff should be encouraged to provide local microbrewery beers, as these are the most favored by conference attendees. Organizers should plan to arrange multiple bar service at each reception to alleviate long lines.

Coffee Service

Coffee service at meeting breaks is a tradition of the annual conference. This service minimally is scheduled for the morning and afternoon breaks Thursday through Saturday. Continuous coffee service is an expensive option and must be monitored closely to stay under budget. Coffee service is to be set up in an area convenient to the meeting rooms and minimally will include the basic service of hot coffee and tea. Free coffee service, if not available immediately adjacent to the Exhibits Center/Book Room, should be placed in the Registration area for the use of both the attendees and the Exhibits Center/Book Room and registration staff.

Planners should encourage hotel managers to set up a cash bar serving soft drinks and juices to supplement the coffee service if they are not already included with the hot beverage service. If a cash bar is set up, it must be clearly distinct from the “free” beverage service.

It is important to note that while coffee service is a highly desired amenity of the meeting, coffee service can be deleted if the cost of that service cannot be budgeted to fit within anticipated conference revenues. The local committee is urged to identify sponsors for the coffee breaks who will pay for the coffee service in exchange for appropriate recognition.

Other Catering Services Including Committee Meetings

The SHA Board and the ACUA require catering service during their meetings. All-day coffee service, including soft drinks and juices, must be provided by the conference for these boards. The SHA Board will require additional food service for its Wednesday and Saturday meetings, paid for by the SHA budget and not the conference. A setup of juices, pastries, coffee, and tea will be scheduled in the morning and at noon a cold-plate lunch for
approximately 15 will be served in or adjacent to the conference room. Payment for catering the SHA Board and ACUA Board meeting beverages comes from conference revenue. No other food and beverage service, excepting that noted above for the Exhibits Center/Book Room and Registration staff. Per SHA Board Policy, organizers may not elect to cover extra food and beverage charges for other scheduled meetings.

NEGOTIATIONS

Introduction

Hotel selection is a core element of planning. Much of the success of the meeting hinges on reasonably priced rooms, facilities, and convention services. Most of the budget planning and resulting registration fees will be tied to hotel charges in one form or another. Ultimately, room rates and registration fees along with travel costs will significantly influence attendance. If meeting attendance falls short of planned projections, conference finances will be degraded because of lower revenue and, perhaps, additional hotel fees.

The goals of hotel negotiations are to obtain reasonably priced room rates; meeting space without charge, complimentary amenities, and services with reduced charges. Organizers can accomplish these objectives by thoroughly researching local convention patterns, understanding and conservatively estimating SHA meeting needs, employing sound business practices; and participating in a bit of gamesmanship.

Organizers must realize that the SHA conference represents a substantial business opportunity for the host community and meeting hotel. The conference will generate over $225,000 in sales and tax receipts depending on attendance. The hotel will profit most through room, food, and beverage sales.

The society also is uniquely positioned in the convention market because of its traditional meeting time in early January. Few sizeable conventions are booked in January in most markets, particularly early in the month. Bookings during early January generally are among the lowest, if not the lowest, in the industry because of the holidays and weather. Even sun-belt markets tend to reflect this pattern.

The society, therefore, normally holds a strong bargaining position with any conference hotel. The conference offers a sizeable meeting during a traditionally weak period in meeting sales. If this position is exploited to its fullest, a highly cost-efficient meeting will result for conferees, meeting organizers, and the society.

Competition is essential if the society is to benefit from its bargaining position. Two or more hotels in a host community should meet the basic conference requirements. Two or more venues will be considered for the same annual meeting, at least as far as any host community and its hotels know. Organizers can easily “give away the store” by informing local hotel or other travel and tourist industry representatives that the proposed conference venue has no rivals.
Meeting organizers also must remember that Convention Bureau and Chamber of Commerce representatives are members of the travel and tourist industry. Their role is to bring convention business into their community. Their allegiance is to local business establishments and their contacts and networks include the venue’s tourist/travel professionals. Information that may affect the society’s bargaining position must be very judiciously shared with these representatives. As a rule of thumb, if asked for information and data and there is even the slightest doubt about its impact on the society’s position, don’t provide it. A friendly call back after checking on the matter can resolve the issue.

**Individuals Responsible**

The Board charges the Headquarters Staff with the responsibility of negotiating with the hotel(s). The Headquarters Staff closely consults with the Conference Coordinator and Conference Chair, who has already narrowed the possible hotels down to the two most attractive proposals. The Conference Coordinator reviews and comments on all hotel proposals and draft hotel contracts. The Headquarters Staff forwards the hotel contract to the SHA President for review and signature on behalf of the society.

**Selection and Negotiation Process**

Prospective meeting organizers usually initiate the hotel selection and negotiation process after discussions with the Headquarters Staff. The organizer(s), particularly the Conference Chair, is encouraged to visit potential conference hotels prior to initiating any formal contact. An informal walk-about can greatly contribute to an early assessment of a hotel’s potential as a conference venue.

The Conference Chair is normally asked to recommend several area hotels that may be appropriate venues for their meeting. A site visit is then held by a Headquarters Staff representative, the Conference Coordinator, and the Conference Chair to review both guest room and meeting room availability at each hotel. Site visits allow the Director of Sales, or a designated sales representative who will handle the account, to sell the establishment. A tour of various room grades, meeting facilities, dining and drinking establishments, and other amenities may be expected. A complimentary business lunch or dinner almost always is arranged in conjunction with the tour, and a night’s stay in the hotel may also be offered when rooms are available. Individuals must be prepared with sufficient data to assess the hotel and provide the sales representative(s) with enough information to engage interest. The Headquarters Staff subsequently sends Requests for Proposals (RFPs) to hotels that have sufficient facilities to fill the anticipated needs of the meeting.

The Headquarters Staff receives proposals submitted by the hotels and submits those proposals to the Conference Coordinator and Conference Chair for comments. The proposal that offers the best value to the SHA and meets the needs for the meeting as an appropriate venue is then forwarded to the SHA President for signature. In the end, however, one establishment usually stands out clearly from its competitors. Although desirable room rates and service charges are highly significant, these alone may not win
the society’s conference. Factors such as location, superior meeting space and facilities, security, or a hotel chain’s past convention performance with the society, may influence recommendations and affect the final selection. In short, the best overall hotel package will be selected, not necessarily the least expensive.

The Headquarters Staff, in consultation with the Conference Coordinator, makes the selection of the conference hotel after review of the final proposals. If the board has previously acted to accept a venue pending conclusion of final negotiations and the contents of the agreement fall within normal meeting parameters, the Headquarters Staff forwards the best proposal to the SHA President for review and signature. If a venue’s conference proposal has not been previously submitted or the board has previously tabled a meeting proposal, then the meeting proposal along with the recommended final hotel offer must be submitted for action by the Headquarters Staff to the SHA President.

**HOTEL PROPOSALS**

Hotel proposals and contracts convey offers, agreements, and conditions related to convention services provided to the society. Offers usually are conditioned on the number of guest rooms reserved (the room block) for the conference. Usually, meeting space and other requirements, services, and perks are linked to selling a set number of guest rooms to conferees. Innovative negotiating, however, may result in relating meeting space and other requisites to catered functions rather than the room block. In Cincinnati, for example, it was agreed that all meeting space would be provided free of charge if the conference held its banquet in the hotel.

All parties involved in hotel selection must be well acquainted with data from past meetings in order to request and assess proposals. Appendix A contains a variety of tables listing data pertinent to hotel negotiations.

The proposal will include several specific items that are subject to negotiation. These are:

- Room block
- Complimentary rooms
- Room rates
- Meeting function space
- Miscellaneous services

The SHA’s negotiating position with the hotel is the strongest before the contract is signed. If the Site Committee wants special dispensations, cost waivers, time extensions, and any other kind of deal, the time to make the deal is before the contract is signed. Whatever is agreed to has to be in the written contract so that the hotel’s convention manager or other similar person cannot deny the agreement or charge extra for a service.
Room Block

The room block is the number of rooms reserved daily by the hotel for the meeting. The size of the room block is important because hotels usually correlate conference room rates, the complimentary room ratio, and meeting space charges with this figure.

In recent years (Cincinnati, Atlanta, Quebec), actual room occupancy at the conference hotel (does not include overflow rooms at other hotels) has ranged as follows:

- Monday: 12 – 108
- Tuesday: 90 – 308
- Wednesday: 375 – 436
- Thursday: 355 – 460
- Friday: 312 – 454
- Saturday: 46 – 421
- Sunday: 6 – 85

The average occupancy per day at the conference hotel has been 61 for Monday, 220 for Tuesday, 406 for Wednesday, 397 for Thursday, 374 for Friday, 246 for Saturday, and 45 for Sunday.

Total room nights at just the conference hotel for these conferences range from 1,196 to 2,272. Organizers planning meetings in the eastern continental U.S and Canada, therefore, can anticipate that a minimum of 1,200 rooms will be sold, with daily (or nightly) sales distributed in the above pattern.

Any agreement based on room block figures must reflect the historical daily and total patterns of the society’s meetings. In such an agreement, *daily figures should not range outside those cited above and combined room sales should not exceed 1,200 or so unless the conference location is one like Quebec that could be expected to draw a longer and more heavily attended stay.* Inclement weather can affect actual room sales and that factor needs to be a planning component. Indeed, daily room and combined total sales should be negotiated to ensure that SHA fulfills its commitment. Further, any agreement must include a clause stating the hotel may not change the size of the room block without the consent of the society.

Complimentary (COMP) Rooms

Comp rooms are an element of the room block negotiations and a sales tool for the hotel. Comp rooms are guest accommodations provided by the hotel free of charge. The number of allocated comp rooms is based on a ratio of one accommodation per so many guest rooms sold nightly. The hotel industry standard is 1:50. This figure is highly negotiable. Organizers recently have secured comp room ratios varying between 1:25 and 1:35. Occasionally, hotels refuse to reduce the ratio and violate the industry standard, but will provide a range of free rooms on the side to meet society needs. In Kansas City, for example, the “official” comp room ratio was maintained, but the hotel agreed to provide
six free rooms per night off-the-cuff. They also provided a number of upgrades to a concierge level or parlor suite for payment of the normal conference rate.

Comp rooms are significant to meeting planning because they allow the society to offer free accommodations to officers, award recipients (Refer to section on award-related costs), and conference personnel, as needed (be sure to confirm that each individual wishes complimentary lodging). Hotel negotiations and budgeting must ensure that the following individuals are provided with complimentary accommodations: **(Pat, for the past two years, the Board has approved funding to cover the travel and accommodation expenses of each Board member at the SHA conference. Technically, then they don’t actually need comp room, but if they receive a comp room, then there is less of an outlay for the SHA. This was an area of considerable misunderstanding this year as the Conference Committee freely gave away the comp rooms, exceeding the number that we received. I would suggest strongly that this be spelled out very clearly. The Committee Chair needs explicit direction on this.)**

- SHA President (Parlor Suite)
- ACUA Chair
- Recipients of the J. C. Harrington, Carol V. Ruppé, and John L. Cotter Awards (per Board policy, these room costs are borne by the Awards Committee).
- Secretary-Treasurer
- Editor, *Historical Archaeology*
- Editor, SHA Newsletter
- Board Member, Senior
- Board Member, Senior
- Conference Coordinator
- Conference Chair
- Local Arrangements Chair
- Program Chair
- Employment Coordinator

The rooms for the Headquarter staff are not reimbursable from conference revenues since they are part of the contract for that service. The SHA pays for the rooms (and travel expenses) of other Board members outside of those allotted above. These costs do not come from conference receipts.

Innovative planning and budgeting will allow organizers to utilize comp rooms to their best advantage. Suites require expenditure of multiple comp-room nights. The size and number of equivalent comp nights for suites must be carefully reviewed to ensure proper allocation of resources. The Conference Chair is the final decision maker should additional comp rooms be available and has the sole authority to decide on their use, except that they cannot be provided to award recipients other than the three listed above.
Room Rates

Conference room rates are the key component of the negotiation process. Room rates may affect whether individuals attend the conference or elect to lodge in the meeting hotel. If room rates are perceived as too high, conference attendance and hotel registration may be reduced. In either case, conference revenue will suffer.

Hotel room rates vary tremendously by season, location, and year. The society has negotiated rates varying between $50 and $139 per night for recent and near future meetings. It is important to negotiate room rates as low as feasible to encourage attendance. Rates for 1992 through 1996 meetings were secured when agreements were concluded well before the meeting. Establishing firm, fixed rates has become the standard, i.e., rates are locked in with the signing of the contract. Do not let the hotel obtain an open-ended arrangement, wherein conference rates are set one year prior to the meeting. Usually the sales personnel will offer to conclude an agreement that sets the rates at current conference prices plus 4%–6% inflation per year or at a discount from the rack rate (rates posted in the room). Richmond organizers found that the former was the more cost-effective alternative since rack rates are not market driven but appear rather arbitrarily defined. The Richmond committee, after researching the market, particularly with respect to government discount rates, renegotiated for rates below both the inflation and discounted rack rate figures. Subsequently, and based on the Richmond experience, fixed rates of $79 were negotiated by the 1995 Washington meeting organizer. This action allowed the Kansas City, Vancouver, and Cincinnati committees to conclude similar rate agreements. Further, the Cincinnati rates were confirmed with the conclusion of the agreement.

A minimum of 10% of the room block needs to be at the prevailing government per diem rate for the area. This is imperative if that rate is lower than the conference rate. To obtain rooms at the government rate, conferees show the appropriate ID and official travel papers.

Every effort must be made to secure room rates as far in advance of the meeting as possible, preferably when the hotel agreement is concluded. Recent trends suggest that the boom of hotel construction in the 1980s is past and companies are closing marginally profitable establishments. Fewer rooms and increased costs are predicted in the future. Keeping in mind that national and local economies and the resulting market forces strongly influence the situation, research and realistic negotiations will be absolutely necessary to keep meeting costs in line with historical patterns.

Hotel room rates are negotiated depending on the number of occupants per room, one through four: single, double, triple, and quads. One rate quote for a single or double is standard. Triple and quad quotes usually are obtained, principally for the benefit of students and entry-level professionals, and the price normally reflects adding a set amount for the third and fourth occupants. Occasionally, the type and number of beds will be factored into room rate quotes. A single set rate for all rooms occupied by one to four individuals occasionally is negotiated, as was the case for Kansas City. Obviously, this
single-rate structure would be preferred because it benefits students and entry-level individuals.

Recent past and near future negotiated rates are the best guide to room rates (refer to Table 1 for data from 1990–2000). Quoted rates, it should be noted, do not include applicable national, state, county/province, or municipal taxes. Such fees may be substantial and should be considered as part of the evaluation of a venue.

**Meeting Function Space**

A standard element of the conference is that all meeting function space is provided free of charge. This service may be conditioned by one of two factors. The first, and normal, factor is that the meeting completely utilizes the reserved room block each night. The contract may contain a clause(s) outlining this requirement and the prices that will be charged for meeting space should the society fail to fulfill its room block obligation. Utilizing and negotiating a conservatively estimated room block, therefore, is essential to ensuring that the society meets its room sales obligations.

The second factor that may be used to gain free meeting space is an agreement that the conference holds its roundtable luncheons and breakfasts and banquet dinner at the hotel. This approach was first implemented by the Cincinnati meeting organizers. The only provision required for meeting space at Cincinnati was that a program outlining all space requirements be submitted to the hotel six months prior to the event. Obviously, this agreement places the meeting in a less vulnerable position because precise numbers are not employed and the society simply must conduct standard, programmatic events at the hotel.

Further, placing all roundtables and the banquet at the hotel is the most logical and feasible arrangement, since breakfast and luncheon attendees will be attending sessions before and/or after the meal. Hosting these events within the hotel also simplifies the coordination efforts since multiple venues do not have to be managed. To provide an alternate to the lunch venue, breakfast roundtables could be a viable supplement, particularly if demand exceeds the available lunchtime space.

Charges for room setup for a particular function or event are not acceptable. Some hotels will be reluctant to identify specific rooms for conference use until the “last minute.” Organizers must insist that meeting space be identified by name in time to print the final program. All meeting space must be reserved on a 24-hour basis.

**Miscellaneous Services**

Hotels normally provide a list of all charges related to conference services. These lists must be carefully reviewed by potential meeting organizers to ensure that all costs are known, negotiated, and budgeted. If cost guidelines are not issued as part of the initial hotel proposal packet, they must be requested.
Virtually all services can and should be negotiated. Food/Beverage services in particular should be discussed and negotiated. The price, frequency, and duration of coffee service for breaks, and menu and cost for breakfasts, luncheons, and dinners are particularly open to bargaining.

In short, everything is on the table. Innovative thinking and good business skills will produce the best results for the society’s conference and its organizers.

Before the conference begins, it should be decided which local conference committee members, in addition to designated representatives of the Headquarters Staff, have the authorization to work with the hotel staff on behalf of the conference. It is recommended that Headquarters staff be designated as the primary contact with the Hotel and that all communications and requests be coordinated through Headquarters. If someone other than Headquarters staff serves in this capacity, these individuals should meet with hotel staff before the meeting so they are known, and so they know who on the hotel staff to call on for assistance. Some hotels provide a physical designation of authority, such as a pin, which can be placed on the liaison’s badges. This relationship allows for situations to be quickly addressed by those in authority. Issues will range from the mundane, such as temperature changes and providing more chairs in a session, to the critical, such as addressing an audio-visual problem. In Atlanta, the Local Arrangements Chair and the Conference Chair were provided walkie-talkies by the hotel with which they could communicate requests to hotel staff. Establishing these points of contact is critical so that when there are problems everyone knows who on the Conference Committee to speak to, and the hotel staff knows to respond to this person’s requests. At least one conference staff person with this authority should be in reach at all times via walkie-talkie or cell phone.
IV. FINANCES

INTRODUCTION

Financial planning is one of the most critical aspects of conference planning. Because it involves a healthy dose of predicting the future, it is also one of the most intimidating.

The goal of financial planning is to anticipate revenues and expenditures, and develop a budget that is realistic and that is designed to result in the best conference possible. In facilitating a quality conference, financial planning does not differ from other aspects of conference planning.

All conference revenue will be handled by the SHA Headquarters Staff. Constructing and implementing an accurate conference budget requires close communication and cooperation between the Conference Chair and the Headquarters Staff.

THE BUDGET AS A PLANNING TOOL

The development of a conference budget should be approached as a fundamental planning task and the resulting approved budget used as an elemental management tool. To develop a budget, the activities of every conference committee must be reviewed and itemized. All conference revenues and expenditures must be anticipated and estimated. The budget will be used to determine and set conference fees for registration and other events or functions.

Revenue projections compared to actual receipts from the call for papers may modify the original document and conference planning invariably will call for additions to and modifications of anticipated expenditures. Flexibility, therefore, is needed during the course of conference planning, but the ultimate goal of a quality conference with a positive closing balance remains unchanged. Once the conference begins, it will be too late to make any major adjustments. The budget, therefore, must be reasonable, accurate, and conservative as a hedge against the unanticipated cost.

INCOME RESOURCES

The conference is intended to be self-supporting in that SHA membership revenues do not underwrite any conference expenses. There are a variety of potential sources of income for the conference, but the most common take the form of institutional support and registration fees.
Institutional Support

The most important source of income, but one that is rarely quantified except as volunteer hours, is institutional support. This typically comes from the host institution(s) as well as other institutions associated with program chairs. The amount of institutional support available will vary, but must be carefully assessed before committing to a conference and before preparing a budget. Institutional support typically includes, but is not limited to the following:

- Staff time will involve a sizeable number of individuals and in the months just prior to the conference may consume substantial blocks of time
- Long distance telephone costs have been substantial in the past, but have been greatly reduced in recent years through the use of email.
- Photocopies
- Incidental postage
- Office supplies

Before agreeing to host a conference, the prospective Conference Chair should:

- Carefully assess the support capabilities of the host institution(s);
- Obtain commitments from persons willing to serve as key conference staffers; and
- Discuss the implications of the conference with the administrators of the host institution(s).

The requirements and expectations related to hosting a conference must be clearly discussed with all involved parties. If commitments cannot be obtained from key staff or sufficient support is not forthcoming from the host institution(s), then viability of the proposed conference should be strongly questioned.

Registration Fees

The conference should plan on receiving most of its cash revenues from registration fees. Registration fees are collected at three times:

- In the Spring with the submission of abstracts;
- In the Fall following distribution of the advance registration packets; and
- At the conference as on site registration and for the purchase of tickets for events not obtained with preregistration and conference mementos.

Registration fees should be set in consultation with the Headquarters Staff, the Conference Coordinator and the SHA Board, and should be based on a completed budget and a conservative projection of attendance. Established fees must be sufficient to fund the budget.

Registration fees will be set for the following categories:

- Member, preregistration
- Member, registering after preregistration deadline or on-site
• Non-member, preregistration
• Non-member, registering after preregistration deadline or on-site
• Student-member, preregistration
• Student-member, registering after preregistration deadline or on-site
• Non-member student, preregistration
• Non-member student, registering after preregistration deadline or on-site
• Spouse/Accompanying Guest (Non-participating)*
• One-day (designed for local non-professionals)†

* Entitles an individual to attend social functions and tours only.
† These categories pose challenges for the Registration Committee, and should be handled carefully (Section VI: Registration).

In setting fees for these various categories, several rules apply. The first is based on a board decision that non-member registrations will be at least double the fees for member registration, with exception made for students. A second is that fees for registering after the preregistration deadline or on-site should be such that it is a real financial advantage to preregister. To simplify the process of setting registration fees, formulas are used (Table 4). There is no attendance charge for the Public Session.
TABLE 4. REGISTRATION RATE FORMULAS

<table>
<thead>
<tr>
<th>Registration Category</th>
<th>Preregistration Rate</th>
<th>After Preregistration and On-Site Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member</td>
<td>R</td>
<td>1.75R</td>
</tr>
<tr>
<td>Non-Member</td>
<td>2R</td>
<td>3R</td>
</tr>
<tr>
<td>Student Member</td>
<td>.5R</td>
<td>R</td>
</tr>
<tr>
<td>Non-Member Student</td>
<td>.75R</td>
<td>1.25R</td>
</tr>
<tr>
<td>One-Day</td>
<td>Not Offered</td>
<td>.33R (on-site only)</td>
</tr>
</tbody>
</table>

Table 5 illustrates the rates that would be established using, as an example, a base rate of $75 for advance registration for members. Fees for the Spouse/Accompanying Guest categories should be based on precedent and discussed with the Conference Coordinator.

TABLE 5. EXAMPLE OF REGISTRATION RATES

<table>
<thead>
<tr>
<th>Registration Category</th>
<th>Preregistration Rate</th>
<th>After Preregistration and On-Site Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member</td>
<td>$75 (R)</td>
<td>$131 ($75 x 1.75)</td>
</tr>
<tr>
<td>Non-Member</td>
<td>$150 ($75 x 2)</td>
<td>$225 ($75 x 3)</td>
</tr>
<tr>
<td>Student Member</td>
<td>$38 ($75 x .5)</td>
<td>$75 (R)</td>
</tr>
<tr>
<td>Non-Member Student</td>
<td>$50 ($75 x .75)</td>
<td>$100 ($75 x 1.25)</td>
</tr>
<tr>
<td>One-Day</td>
<td>Not Offered</td>
<td>$25 ($75 x .33)</td>
</tr>
</tbody>
</table>

Occasionally, there have been complaints that friends, spouses, and older children cannot attend papers unless they are registered. One-day registrations help to alleviate that complaint. Since the conference has to financially contribute back to the society, it is not
feasible to bend the rules. Further, there have been requests to have a reduced rate so that children could attend the banquet and receptions more economically. The conference is charged a per person fee by the hotel; therefore, it is not feasible to offer children of registrants a reduced rate. Refer to Section VII for more information relating to childcare.

**Miscellaneous Revenues**

Miscellaneous revenues are possible from sales of commemorative items during preregistration and at the conference. In the past, such sales have included commemorative trowels, lapel pins, coffee mugs, hats, T-shirts, and sweat shirts. Revenue comes from pricing these items comfortably above their actual cost (including design work).

Commemorative items should be designed and suppliers identified early in the planning process. Reliable turnaround times should be obtained from suppliers so that you know precisely when to place an order (add some time to the supplier’s turn around time to allow for delays).

When possible, commemorative items should not be ordered until the close of preregistration, assuming these items are offered for sale through preregistration. Then, take the total money for sales of commemorative items and invest that in the purchase of the items. Because the sales price will contain a profit, your purchase will cover all the orders you have from preregistration and will provide extra items to sell at the conference. Using only what advance sales funds that are on hand to purchase commemorative items ensures that on-site sales will constitute pure profit and make commemorative sales a no-lose situation.

Commemorative items with the SHA logo are also popular. Currently, since the redesign of the SHA, these are not available for sale. Should they become available, arrangements for their sale and the return of proceeds to the SHA would need to be coordinated with the SHA Treasurer and the Headquarters Staff. All items with the SHA logo must meet the guidelines contained in SHA’s graphic standards manual. This manual is available from the Headquarters staff.

Miscellaneous revenues also may be derived from tours. After costs of the tours are determined, ticket pricing may include a modest profit that will be realized if a tour is full. Ticket mark-up also will give the option of proceeding with the tour even if sign-up is less than anticipated but still at or above the break-even point.

Yet another way to realize revenues is through the mark-up of banquets and luncheons above the hotel costs. As hotel costs for these functions increase, however, this becomes less possible because of traditional price ceilings for events and the desirability of attracting the largest number of attendees.
Grants

Grants may be pursued at the discretion of the Site Committee to help fund the conference, especially if special enhancements are desired. If grant funding is pursued, proposal preparation, submission, and hopefully, award should be sufficiently in advance of the conference to allow realistic integration into the conference budget. The SHA’s Procedures for Agreements and Procurements are to be followed throughout the grant process (this document is included in Appendix F). Do not use pending grants to fund any function of the conference. If there is any questions as to whether grant funds or other support from a particular source should be sought or received, the Conference Chair should consult with the Conference Coordinator. Grant monies must be sent directly to the Headquarters Staff.

Donations

Donations may be an important part of conference revenues, and, like grants, should be “in the bank” before they are considered as revenue in the conference budget. Donations may take several forms, for example:

• Loans or discounted rental of equipment (AV, computers, etc.). If the hosting organization does not have AV equipment, and rather than rent it at high cost from the conference hotel, an arrangement might be made with an anthropology or history department at a local university to either borrow or rent AV equipment. Such an arrangement must make clear that the SHA is not responsible for loss of or damage to barrowed equipment.

• Organizational commitments to provide volunteers. A good way to involve local anthropology, archaeology, or history groups in the conference is to work with them to provide on-site volunteers. This sort of arrangement is particularly useful where the host institution is not a university.

• Cash donations from individuals or organizations. Cash donations from individuals have been solicited in the past to establish special funds to defray costs of students. Cash donations from local anthropology, archaeology, or history groups may also be solicited in exchange for being listed as a conference co-sponsor.

• Cash donations or discounted services from corporations. In the past, cultural resources consulting firms have helped subsidize luncheon workshops, student attendance, receptions, and coffee breaks.

• Cash received from a registration line item earmarked for support of student attendance at roundtable lunches, the Banquet, and workshops. (In essence, these are earmarked donations and cannot be used as a true revenue source).

• Discount coupons can be solicited from local businesses and cultural attractions (bars, restaurants, museums, etc.) and distributed at the conference. These are often available from the Chamber of Commerce.

• Support from local convention and visitor bureaus. This may be particularly useful in promoting the conference. Support may range from providing brochures to include in mailings and for use at information tables at preceding conferences, to paying for
promotional receptions at a preceding conference, or to hosting a reception or coffee break at your conference.

Donations may be an important source of income but, once again, unless a firm commitment is in hand, they should not be used as revenue in the conference budget. Also, while you are certain to obtain some donations such as those listed above, don’t expect too much. Refer to later sections in this chapter for guidance on the handling of cash and other donations.

Volunteers

Volunteers are important assets. Their service is essential to planning and managing a cost-effective conference. Volunteers usually are provided complimentary conference registrations and therefore their assistance will reduce both revenues and costs. A volunteer is normally required to spend the equivalent of one full day of service at the meeting to receive a free registration. On-site volunteer status enables more students to participate in the conference since some of their expenses are defrayed. Regardless, the impact of volunteers on the budget should be kept in mind and volunteer planning should be done efficiently and in consultation with Headquarters staff.

Exhibits Center/Bookroom Fees

The SHA encourages maximum participation by exhibitors at meetings. At the same time, exhibitor’s fees are viewed as a source of revenue, and the trend in recent years has been to increase table fees to a level commensurate with fees charged by organizations similar to SHA. Table fees are set on a meeting-by-meeting basis by the Headquarters Staff, the Local Committee, and the Board to insure that the exhibit center/bookroom is self-supporting and returns at least some profit to be used in the conference budget.

ANTICIPATED EXPENDITURES

Conference planning and the actual conference will result in a wide range of expenditures, all of which must be carefully anticipated and estimated in the process of preparing a budget, and carefully monitored once a budget is adopted. Some expenses will be difficult to estimate in advance, while others may be more closely predicted based on proper research. In anticipating expenditures, remember that it is better to estimate too high than too low.

Printing

One of the largest single expenditures will be printing. Rising printing and shipping costs has led to the decision to publish the call for papers and the preregistration package in the SHA Newsletter and on the SHA web site. Printing is normally arranged by the Headquarters Staff unless the Local Committee has a local source of inexpensive shipping
that would save shipping costs to deliver the needed items to the conference venue. Printing arrangements are to be finalized in consultation between the local committee and the Headquarters Staff.

- Abstracts book
- Program book
- Name tag blanks
- Tickets for luncheons, banquet, tours, and other events
- Information on local restaurants and attractions for registration packet
- Envelopes and other packaging for advance and on-site registration packets

Web Hosting

The Website Editor is responsible for maintaining the SHA website. The call for papers and preregistration and preliminary program are posted on the SHA website by the Website Editor. The Headquarters Staff is responsible for the online abstract submission and conference registration that includes receipt of abstracts in response to the call for papers and full conference registration. Local Committees are urged to prepare a conference-specific website that can be linked to the main SHA website that includes local information that will help members plan their stay at the conference.

Conference Site Committee Travel

Lodging

Lodging is normally provided during the meeting so that key Local Conference staff can stay on-site for the duration. Lodging is a significant conference expense despite the fact that at least some complimentary rooms are provided under the hotel contract. Key staff needs to be available at all times so they may be able to solve unexpected issues, but that need should always be counterbalanced by the impact of lodging costs beyond the complimentary rooms on the conference budget.

Fee Waivers

No society officer, board member, committee chair, coordinator, or member is automatically exempt from remitting established registration fees or charges for ticketed events. Registration fees or charges for ticketed events may be waived for keynote speakers, some overseas attendees, award recipients (only in accordance with SHA policy, see below), and conference staff if the conference budget allows. Any specific registration fee waivers must be established in consultation with the Conference Chair, and Conference Coordinator, and the Headquarters Staff.
Award-Related Costs

It is traditional for SHA awards to be given at the conference. The SHA policies regarding the cost of the awards and who bears the costs have changed often. The following table (Table 5) provides the latest Board guidance adopted at their 13 January 2001 meeting. All estimated costs are based on 2001 fees and expenses.

TABLE 6. SHA AWARDS AND COSTS

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Awardee:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel from residence to conference hotel and return, including airfare ($650), mileage at 25¢/mile, parking, and shuttle fees ($100)</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$750</td>
</tr>
<tr>
<td>Lodging @ $125/night for 3 nights</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$375</td>
</tr>
<tr>
<td>Registration at the preregistration regular member rate</td>
<td>Awards</td>
<td>Conference</td>
<td></td>
<td>$75</td>
</tr>
<tr>
<td>Banquet Ticket</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$40</td>
</tr>
<tr>
<td>Tours (optional)</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$75</td>
</tr>
<tr>
<td>Photo of Awardee for Historical Archaeology</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$75</td>
</tr>
<tr>
<td>Lifetime SHA Membership</td>
<td>N/A</td>
<td>N/A</td>
<td>Reduced SHA Revenue</td>
<td></td>
</tr>
<tr>
<td>Wooden Box for Medal</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$50</td>
</tr>
<tr>
<td>Award Type</td>
<td>Who Pays</td>
<td>2001 Conference</td>
<td>Conference 2002 &amp; Later</td>
<td>Estimated Cost</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------</td>
<td>-----------------</td>
<td>--------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Spouse:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration at the preregistration regular member rate</td>
<td>Awards</td>
<td>Conference</td>
<td></td>
<td>$75</td>
</tr>
<tr>
<td>Banquet Ticket</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$40</td>
</tr>
<tr>
<td><strong>Presenter:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Registration at the preregistration regular member rate</td>
<td>Awards</td>
<td>Conference</td>
<td></td>
<td>$75</td>
</tr>
<tr>
<td>Banquet ticket</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$40</td>
</tr>
<tr>
<td><strong>TOTAL HARRINGTON AWARD COSTS</strong></td>
<td>$1,670</td>
<td>Awards $1,445 Conference $225</td>
<td>$1,670</td>
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</tr>
</tbody>
</table>

**Carol V. Ruppé Award**

<table>
<thead>
<tr>
<th>Expense Description</th>
<th>Who Pays</th>
<th>2001 Conference</th>
<th>Conference 2002 &amp; Later</th>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel from residence to conference hotel and return, including airfare ($650), mileage at 25¢/mile, parking, and shuttle fees ($100)</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$750</td>
</tr>
<tr>
<td>Lodging @ $125/night for 3 nights</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$375</td>
</tr>
<tr>
<td>Registration at the preregistration regular member rate</td>
<td>Awards</td>
<td>Conference</td>
<td></td>
<td>$75</td>
</tr>
<tr>
<td>Banquet Ticket</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$40</td>
</tr>
<tr>
<td>Photo of Awardee for <em>Historical Archaeology</em></td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$75</td>
</tr>
<tr>
<td>Engraved plaque in wooden frame</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$90</td>
</tr>
<tr>
<td><strong>TOTAL RUPPÉ AWARD COSTS</strong></td>
<td>$1,405</td>
<td>Awards $1,330 Conference $75</td>
<td>$1,405</td>
<td></td>
</tr>
</tbody>
</table>

**John L. Cotter Award**

<table>
<thead>
<tr>
<th>Expense Description</th>
<th>Who Pays</th>
<th>2001 Conference</th>
<th>Conference 2002 &amp; Later</th>
<th>Estimated Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel from residence to conference hotel and return, including airfare ($650), mileage at 25¢/mile, parking, and shuttle fees ($100)</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$750</td>
</tr>
<tr>
<td>Lodging @ $125/night for 3 nights</td>
<td>Awards</td>
<td>Awards</td>
<td></td>
<td>$375</td>
</tr>
<tr>
<td>Registration at the preregistration regular member rate</td>
<td>Awards</td>
<td>Conference</td>
<td></td>
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<tr>
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<td>Awards</td>
<td>Awards</td>
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<tr>
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<td>Awards</td>
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<td></td>
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<td>Awards $1,840 Conference $75</td>
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<tr>
<td><strong>Award of Merit</strong></td>
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<td></td>
<td></td>
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Conferences planned and proposed for the years beginning 2002 and thereafter, unless there is other direction from the SHA Board, will need to plan six complimentary registrations for award and prize costs. The SHA Board has also made it a policy that the Site Committee may not elect to cover costs that are not shown in the above table. It is the responsibility of the SHA Treasurer, through the Headquarters Staff, to prepare a travel authorization for the Harrington, Ruppé, and Cotter recipients indicating SHA reimbursable costs. Beginning in 2002, a copy of the travel authorizations will be provided to the local conference organizers. It is strongly suggested that the Conference Chair, Headquarters staff and the Awards Committee Chair coordinate closely with the SHA Treasurer to insure that the budget process, procedures, and award process is planned in accordance with the society’s directives. This process must begin early in the year the conference will be held.
Organizers are referred to Section VII for details on Awards Ceremony procedures.

**Telephone and Other Electronic Communication**

Telephone expenses may be substantial during the planning phase. These expenses generally maybe included within institutional support, but this should be clarified before the budget is prepared.

An essential on-site conference expense is the rental, if not available from host institutions, of high-quality two-way radio or cell phone equipment. All key conference staff should have units so that constant and instant communication is possible. The SHA Headquarters Staff should also have a radio or phone.

**Hotel Charges**

The single largest expense will be hotel charges for a wide range of services. Traditionally, these charges do not include charges for meeting space, but include items such as:

- Banquet charges
- Roundtable Luncheon charges
- Coffee breaks
- Food and beverage service for ACUA meetings
- Food and beverage service for SHA Board meetings (Other catering to be paid for by SHA, not conference)
- Installation of phones, unless wireless phones are used, in conference office and elsewhere
- Microphones and LCA projectors in meeting rooms
- Charges for bartenders for cash-bar receptions (unless covered by sales minimums)
- Charges for conference guest rooms above the complimentary number

Other charges may also be included on the bill. Hotel charges can be carefully estimated and are entirely controllable by the Conference Chair and the Headquarters Staff. Hotel charges should be set up on a master account and a limited number of key conference staff should be authorized to approve charges and changes. The hotel may require that a credit application be submitted before establishing a master account. As needed, a credit application will be filed with the hotel by the Headquarters Staff.

Daily summaries of hotel charges should be obtained and compared against the budget and conference receipts. Avoid situations such as open-ended beverage setups by placing limits on the amount of coffee or the number of soft drinks to be served. Careful monitoring of services during the conference will pay dividends.
Miscellaneous Supplies

A variety of miscellaneous office supplies will be needed throughout conference planning and at the actual conference. Planners should develop list of supplies and project their costs. Common supply items include pens, pencils, file folders, staplers, storage boxes, notepaper, cash boxes, and similar items. Some hotels have an in-house Headquarters Staff where some supplies and services may be obtained. These include word processing, printing, faxing, and purchase of supplies. These services can be a lifesaver during the press of the conference to keep things running smoothly but need to be accounted for in the budgeting process.

Entertainment

Many conferences in the recent past have hired a local band for a dance. This has been a free event open to all conference attendees. Entertainment expenses normally are paid from conference revenues. Besides normal fees, costs of continuing this tradition can include transportation, room fees, and similar expenses to be negotiated between the conference organizers and the band, should this arrangement continue.

Tours

Tours should be designed to be at least a break-even, or preferably, moneymaking propositions, and should be cancelable without undue penalty. Although the money will be recouped, tours will require expenditures in the form of deposits and payments for buses, hiring tour guides, admissions to museums, lunches, refreshments, etc. Tickets for tours not filled by the beginning of the conference, should be available for purchase at the registration desk.

Audiovisual Equipment Rental

Audiovisual (AV) equipment rental may be a large expenditure, especially if a hotel-based AV contractor is used. AV equipment needs should be carefully estimated and should include backup equipment. Also, even though AV needs should be specified when abstracts are submitted, be prepared to receive and fill last minute requests. Prior conferences have purchased laser pointers, and these are passed on from one conference to another. Only a few additional purchases of pointers might be needed.

The cost of AV equipment from hotel based or other commercial sources is extremely high. Other alternatives might be explored for obtaining the needed equipment. The Board has determined that only Power Point equipment will be provided in the meeting rooms. This includes a LCD Projector, a screen, and a sound system. Presenters are required to provide their own laptops, and symposia organizers are encouraged to provide a laptop so that all of the presentations can be preloaded as a time saver during sessions. Any presenter who will require a slide projector, overhead projector, or other AV equipment will be required to provide their own equipment. Renting equipment from the hotel or its
recommended agent may be required, although Power Point equipment may also be provided by an outside supplier or on loan from local companies or institutions.

In the event that a non-hotel source for AV equipment is used, an account with the hotel AV contractor to handle unforeseen last minute or emergency needs to be setup. Equipment obtained this way will be costly, but this is really the only way to handle such additional needs.

**Commemorative Sales Items**

Sales of commemorative items should be designed to be moneymaking affairs. Funds will have to be expended in advance of the conference, however, for design work, and in purchasing and packaging the sale items for distribution. Refer to the previous section for additional information.

**The Unexpected**

A healthy contingency category should be included in the budget. The unexpected most certainly will occur between the time the budget is developed and the conference takes place. Add 10% for unexpected expenses. If not needed, the contingency fund will act as a buffer in case attendance projections were too high, or will serve as additional profit.

Some conferences (Baltimore, Washington, and Providence) have had to expend extra funds due to the mandated use of union personnel for work in the hotel, and this circumstance may be the case elsewhere. Further, extra costs may be involved in obtaining additional power hookups. The Conference Chair should ask about what fees apply if they are not covered in the normal charges. The mandatory use of union labor could be such a large cost that it may make the conference budget difficult to be profitable. As a result, during the proposal and selection process, this is an important factor to consider.

**SHA Revenue**

The conference is expected to produce revenue for the society. The current minimum expected revenue is $7,500. That dollar amount is included as a line item in the society’s annual budget. Recent conferences have failed to generate a profit, and registration fees have been sharply increased to prevent future financial losses. Profitable conferences are key to the long-term financial health of the SHA, and every effort should be made to control costs while insuring that each attendee has a positive experience. On occasion, the Board also has approved a surcharge on conference registrations, which goes directly to the society.
BANK ACCOUNTS AND FINANCIAL REPORTING TO THE SHA

All revenue raised or generated by and for the annual meeting is to be sent directly to the Headquarters Staff, to be handled per SHA policy. All bills received by the local committee will be promptly sent to the Headquarters Staff for payment. Per SHA policy, any individual item that costs over $3,000 has to be approved in advance by the SHA Treasurer. The Headquarters Staff will provide updates, as requested, on the revenue received and the source of the revenue to the local committee, the Conference Coordinator, and the SHA Treasurer so that the financial progress of the meeting can be assessed against the budgeted line items. A timely summary of all income and expenses and profit/loss will be prepared and submitted to the local committee, the Conference Coordinator, and the SHA Treasurer once the hotel charges are settled.

REGISTRATION SOFTWARE

The Headquarters Staff is responsible for maintaining registration software to be used for each meeting. All preregistration will be handled by the Headquarters Staff, and the Headquarters Staff will have staff present at each meeting to oversee on-site registration and receipt of registration funds.

INSURANCE

Certain hotels may require conference cancellation insurance before a contract can be signed. Specific information on the insurance policies in effect can be obtained from the Headquarters staff.
V. THE PROGRAM

INTRODUCTION

This section provides guidance on preparing invitations to society members and the public to participate in the conference through meeting announcements and the call for papers. The expectations for evaluating abstracts and other proposals and the considerations for assembling sessions are detailed. Planning conference social events is discussed. Requirements, suggestions, and deadlines for integrating sessions with social and administrative functions are outlined.

Planning the program and carrying it to fruition is a complex operation. Every member of the conference staff will be involved. All principal chairs will have the lead at one point or another in arranging or implementing one or more aspects of the meeting. Coordination and communication are essential.

ANNOUNCEMENTS

The Conference Chair should ensure that advance notification of the conference is disseminated widely. In January two years before the conference (e.g., January 2001 for 2003), a general announcement of the meeting will be sent by the Conference Chair to the SHA Newsletter Editor for the March issue. The announcement will be updated each quarter with information on conference theme, hotel accommodations, proposed tours, and key conference personnel, as appropriate.

In December two years before the meeting (e.g., December 2001 for 2003), brief notices such as the following example will be sent to the following publications: AAA Anthropology Newsletter, Federal Archeology Report, Current Anthropology, and the SAA Bulletin.

Pertinent information should also be posted on list servers, such as: HISTARCH, ARCH-L, ACRA-L, SUB-ARCH, and others as deemed appropriate.

January 5–9, 1994. SHA’s annual Conference on Historical and Underwater Archaeology; Hotel Vancouver, Vancouver, BC. Abstract submission deadline—May 1, 1993. Contact: David V. Burley, Department of Archaeology, Simon Fraser University, Burnaby, BC V5A 1S6, Canada; Ph: (602) 291-4196, Fax (602) 291-4727.

Each notice should be formatted appropriately for inclusion in the recipient publication’s “meeting calendar” section. The announcement should include meeting dates, city;
deadline for abstracts, the conference theme, if applicable, and contact information, including name, address, telephone and fax numbers of the Conference Chair, as well pertinent as email addresses and the conference Web site if one has been established. Submissions should request publication of the notice in each issue of the newsletter leading up to the conference.

If the conference location is within an area served by regional or state/provincial archaeological societies (professional and avocational), the Conference Chair will also place notices in their newsletters. Format and content should conform to the standards of the publications.

CALL FOR PAPERS

Presentation and Submission Requirements

Membership

SHA membership is not required for an individual to make a presentation at the annual conference. Non-members, however, will be assessed a higher registration fee than members.

Ethics Statement Endorsement

The society requires all individuals who wish to make a presentation at the annual conference to subscribe in writing to the society’s ethical position as published in Article VII of the Bylaws (Appendix B). Endorsement of the society’s ethical position statement is required for submission of abstracts. The ethics statement should appear on the Abstract Submittal form along with a signature line. Any abstract submission not properly endorsed must be immediately returned.

Abstract Submission Fees

Individuals wishing to make a presentation at the annual meeting will be required to preregister for the conference when they submit their abstracts. This means that full payment of advance registration fees (not including event costs) and any required abstract submittal fee must be attached to abstract submittals. Refunds will be granted upon written request through the date determined by the Conference Chair in conjunction with Headquarters staff. This provides sufficient time before compilation and printing of the final program to remove participants who have withdrawn from the meeting.

A minimum of a $25 late fee for abstracts received after the due date will be assessed. Abstracts not received by the due date may not be included in the program. Individuals withdrawing from the program after the refund deadline or not appearing at the conference forfeit their registration fees. Conference Chairs may employ their own discretion in granting refunds for hardship reasons on a case-by-case basis. This policy is implemented to improve meeting administrative and accounting procedures by eliminating partial
payment of registration charges. Headquarters staff must develop methods for documenting late arriving material (e.g., retention of the postmarked envelope stamped with the date received), and procedures for collecting assessed late fees. Any submission received without the appropriate fee must be immediately returned.

Presentation Limit

As a rule, contributors are limited to the presentation of one paper or report at the conference. An individual, however, may serve as a junior author of one or more other presentations; act as a session chair; or participate as a discussant. A discussant, however, may not organize, chair, or make a presentation in the same session. These guidelines have been established to accommodate the largest number of participants possible within the normal time and space constraints of the conference. The Program Chair, in consultation with the Conference Chair, however, may use discretion on a case-by-case basis when applying this rule.

Substitutions

Program substitutions are not permitted once the final program has been assembled and printed, especially during the conference. The Program Directors, in consultation with the Conference and Program Chairs, may use discretion if confronted with highly unusual circumstances or unforeseen events that affect the meeting.

Organizational Guidelines

Conference presentations normally are divided among the following meeting formats: symposia, thematic sessions, and poster sessions. Workshop formats also occasionally are incorporated in meeting presentations.

Organizers solicit, select, schedule, and integrate contributions into an annual conference program. Members customarily are invited to submit organized symposia, papers, reports, or a poster in the call for papers. The Program Chair and Program Directors should list a series of suggested session topics that conform to the conference theme, for symposia or presentations, but also indicate that other symposia are welcomed and encouraged.

Papers and Reports

Single contributions are subdivided into papers and reports based on subject matter, theoretical or methodological perspective, and stage of research. As a rule, papers synthesize data and information, covering broad regional or topical subjects. Reports comment on findings or progress. The length of time normally allocated papers and reports are 20 and 10 minutes, respectively. The report option has seen relatively little use, and few paper authors seem willing to limit themselves to a 10-minute presentation. If paper submittals are numerous, however, the Program Chair may find it advantageous to insist that descriptive papers be accepted only on condition of reduced time.
Symposia

A symposium is a contributed session organized around a topic. Such sessions are arranged by one or more individuals and submitted as a complete unit. Symposia usually include four to eight speakers, each allocated a 20-minute presentation. The session will include the participation of at least one discussant, which comments on the subject at-large and critiques presentations. A symposium also may be structured as a panel wherein participants discuss an issue among themselves and with the audience. A moderator and three to five discussants usually form the panel. Symposia normally are chaired by the organizers and usually are scheduled as either half-day or full-day events.

Thematic Sessions

A thematic session is a meeting structured around a subject. The Program Chair and directors normally organize such sessions from individually contributed papers that share common subject matter. Participants are assigned to a thematic session, usually based on region, period or topic, and allotted time based on the nature of their presentation. Session size and duration is variable and is related to the number of assigned speakers and the amount of time allocated each individual. Most thematic sessions are scheduled as half-day events. Program organizers usually solicit one or two presenters in a session to serve as the Session Chair or Co-Chair.

Poster Sessions

A poster session is an exhibit composed of one or more displays detailing a subject with text and graphics. Since posters are considered contributed papers, these presentations are expected to contain extended remarks and relevant, quality illustrations. Layout must be designed to be displayed on a standard 4 x 8 ft. bulletin board. Poster sessions normally are scheduled as two to three hour events. While posters may be displayed throughout the meeting, contributors must attend their poster during the scheduled session time. Poster sessions are becoming more popular at SHA conferences, and should be encouraged as an alternative means of communicating results of research. Not only do they enable presenters to present data in a different way, they enable the organizers to accommodate more participants when space available on the normal program is limited.

Posters have been displayed in the Exhibits/Bookroom and in other central areas where they are easily visible but not in the way of pedestrian traffic. Refer to the previous discussion of the Exhibits Center/Bookroom. The number of posters and the available space are the determinants of the location of poster sessions.

Workshops and Professional Ed Courses

Various groups and individuals may offer, or be solicited to offer, short courses on topics of interest to the society. Some may be offered by nationally known training institutions, such as the University of Nevada-Reno, or by knowledgeable SHA members. The Workshop Coordinator, usually arranges these courses for presentation on Wednesday of the conference, and a fee is usually paid to the society. The fee charged for the SHA
workshops should be sufficient to cover the cost of travel and one night’s lodging for the Continuing Education Coordinator as well as beverage and food service, if provided. This support of the SHA Workshop Coordinator is not a conference budget responsibility.

The SHA Workshop Coordinator is responsible for communicating early in the process the needed space and audiovisual equipment needs of these workshops to the Headquarters Staff. Headquarters staff may be asked to arrange for the needed AV equipment, but the cost, if any, is paid for by the SHA and is not a conference budget line item.

Other events, such as the film presentations of archaeological projects and topics as held in Salt Lake City, may be arranged for by the program committee. At the Salt Lake City conference, these films were presented in the evening at times where they did not conflict with other scheduled events.

Preparing the Call for Papers

Schedule

The Program Chair, on behalf of the two Program Directors, is responsible for both content and distribution of the Call for Papers. Pursuant to Board policy, the Call for Papers is to be published in the March edition of the SHA Newsletter preceding the conference. The Newsletter publication of the Call for Papers totally replaces the mailed-out version that used to be made to members.

All calls for papers should include information regarding the Student Paper Prize.

Format and Content

The call for papers is composed of two parts. The first is a statement containing a complete description of program presentation options and guidelines, participation requirements, and fees. This narrative must include notice that endorsement of the ethics statement is required along with the reprinted text of Article VII of the Bylaws (Appendix B). Critical information will be highlighted.

The second part of the call for papers is an abstract form (Appendix C). This form must be simple, straightforward, and complete. The form must provide the following essential data:

- Conference name or identification, e.g., SHA 1999 Salt Lake City
- Purpose of form, i.e., Abstract Submittal Form
- Program Chair's name, address, phone and fax numbers, and email address
- Terrestrial and Underwater Program Directors’ names
- Abstract preparation instructions, e.g., double-spaced, 150-word maximum
- Signature block for endorsing the ethics statement
- Statement on applicable fees
- Statement that only Power Point equipment will be provided in the meeting rooms and that presenters must provide their own laptops
• Directions for check endorsements, mailing instructions, and electronic submittal
• Deadline date and statement of late penalties, if applicable
• Clarifying procedural comments

And, elicit the following information:

• Submitter data
  ◊ Name, address, and telephone numbers, i.e., work, home, and fax
  ◊ Email address
• Institutional affiliation
• Type of submission
  ◊ Symposium
  ◊ Contributed paper (20 minutes) or report (10 minutes)
  ◊ Poster session
  ◊ Other contribution as applicable
• Title of submission
  ◊ Identifiers and key words
  ◊ Region
  ◊ Period
  ◊ Topic or content characterizations (2)
• Special space or room setup requirements

Symposium organizers should be reminded that their proposals must be complete. A complete symposium packet includes a symposium abstract, individual abstracts, the sequence of papers, the discussant(s); and payment of applicable submission fees for each presenter, preferably by separate checks. Further, all abstracts must be submitted in digital form.

The call for papers should solicit volunteers to lead suggested roundtable luncheon or breakfast discussions or one of their own choosing. No formal abstract is necessary for this function, however, and so discussion leaders can directly contact the conference staff identified in the call for papers.

**Receipt of Submissions**

All conference abstract submissions will be sent to the Headquarters Staff. The Headquarters Staff will document receipt of the material, determine timeliness and document arrival date if late fees are to be assessed, and separate the submission fee payment from the abstract (Appendix C). The Headquarters Staff then will send abstracts to the Program Chair for action.

**EVALUATING SUBMISSIONS**

The Program Chair and Program Directors, as part of a panel, will review and jury all submissions. For efficiency, separate panels will review the terrestrial and the underwater
submissions. Because of the difficulty in evaluating underwater submissions, the panel that is charged with reviewing these abstracts should include two (2) current ACUA members to be selected at the discretion of the Underwater Program Director. The two ACUA members serve in addition to the Underwater Program Director and other locally selected panel members. If no current members of the ACUA are available, past Board members or other regional or subject specialists may be selected in consultation with the ACUA Chair by the Underwater Program Director.

The panels will evaluate all abstracts for quality, content, and submission timeliness. Based on these criteria, the terrestrial and underwater panels will determine which submitted papers or proposed symposia will be accepted or rejected (Appendix C, Bylaws). If any question is raised by a panel member about the ethical content of an abstract, the Program Chair will refer the submission to the Conference Chair. The Conference Chair, in turn, will refer the matter to a panel formed by the SHA president, president-elect, and immediate past president for consideration. This presidential panel, in consultation with technical experts of their choice, should that be necessary, will return a decision to the Conference Chair and program panel before 15 August. The decision making process used by the SHA Presidential Panel is to be included in the SHA Procedures Manual, per Board resolution adopted 13 January 2001.

The Program Chair will notify all submitters in writing whether their presentations have been accepted or rejected immediately after compilation of the preliminary program but no later than 31 August. Rejections must be accompanied by the return of fees paid.

ARRANGING SESSIONS

The process of arranging contributions into a coherent set of sessions is a complex one. Time, meeting space, and the number of presentations must be factored with required conference events and optional functions to plan the program. Coordination between principal meeting chairs is essential to accomplish planning, layout, and production of required materials. Arrangements should be made for a working session with the Conference Chair, Program Chair, and the Terrestrial and Underwater Program Directors to plan out the program.

Session Organizational Guidelines

Normally, contributed papers and reports form the majority of submitted presentations. The Program Chair and directors, therefore, must integrate these independent contributions into appropriate thematic sessions. A series of guidelines are presented below as planning aids.

Paper/Report Organizing Criteria

Organizers should develop criteria by which papers and reports are classed, ordered, and scheduled. Scholarship and timeliness should be significant evaluation points. In situations where large numbers of contributions have been received, priority may be given
to presentations that address conference thematic issues and topics that more commonly are associated with the field of historical archaeology.

Length

Time is a factor in organizing sessions. Most forums are scheduled as half-day events. Longer sessions are discouraged. Eleven (11) 20-minute papers and 22 10-minute reports can be arranged in a half-day session, allowing for a coffee break of 20 minutes. Program organizers, however, may find it necessary or convenient to use quarter-day sessions, which normally end at or begin after a break, or full-day meetings.

Layout

Once the independent contributions have been organized into forums with time block allocations, they are integrated with the submitted symposia to determine the number of potential meeting sessions. Meeting sessions are then correlated with all available daily time blocks and meeting room space. Normally, sessions are presented between 8:00 AM and 5:00 PM, Thursday through Saturday. By this stage of program planning, the exact number (usually 6–8), configuration, and capacity of each available meeting room in the conference hotel is known. If the number of sessions cannot be accommodated within the standard Thursday through Saturday hours given the number of meeting rooms available, then organizers have two alternatives: schedule meetings at non-standard times such as evenings or Sunday morning or reduce the number of sessions by rejecting papers/reports or contributed symposia. As a practice, evening thematic sessions should be avoided. The York (2005) local committees scheduled Sunday morning sessions, and that experiment seems to have worked well. That option may be considered in the case of extremely well attended meetings or for meetings with restricted meeting space. If organizers decide that the tentative program must be trimmed, criteria should be established to evaluate the contribution of each symposium and thematic session in light of conference goals and service to the field. This task may feed back to the acceptance/rejection process. No session or event will be scheduled opposite the annual Business Meeting or the presentation of awards.

Plenary Considerations

Planners should consider scheduling opening ceremonies or other special plenary events during the evening. Plenary events normally are designed as stand-alone functions intended for a broad attendance and can be used to feature special presentations by invited speakers. If they are scheduled during normal meeting hours, a major block of time and meeting space, which might be used for several other sessions, is deleted from the program. Accordingly, evening plenary sessions may be a more efficient use of time and meeting space allotments. In all likelihood, an evening plenary meeting will be better attended than a thematic session(s) with contributed papers/reports in the same time slot.
**Daily Schedule**

Daily sessions should not begin before 8:00 AM nor run after 5:00 PM. If evening meetings are planned, they should not begin before 6:30 PM. At least one hour at mid-day must be scheduled for lunch. Open time between short sessions should be arranged. Mid-morning and mid-afternoon coffee breaks must be scheduled for all sessions. Times should be coordinated among concurrent sessions to facilitate audience “browsing” from session to session.

**Attendance Estimates**

Program planners necessarily will have to estimate the potential audience for each session and assign space accordingly, especially if rooms vary in size. Sessions that are narrowly focused likely will be lightly attended. Sessions that are expected to be extremely popular and “hot topic” symposia should be scheduled in the larger capacity meeting rooms or in break-out spaces where seating can be rapidly expanded by adding chairs or opening an adjoining area.

**Avoiding Program Conflicts**

Program organizers must manipulate the program schedule to avoid a variety of conflicts. Care should be taken to avoid scheduling topically similar sessions against each other. If special audio-visual equipment is limited (e.g., only one video monitor available), use must be arranged to avoid concurrent resource allocation. The schedule should be examined for conflicts concerning participants with multiple roles, e.g., paper contributors who are serving as discussants in other sessions. Past Presidents who are on the program should not be obligated to a session that may conflict with their traditional luncheon. Additionally, the Friday late afternoon ACUA meeting should not conflict with the schedule for the Business Meeting or the Banquet.

**Session Chair Responsibilities**

A Session Chair(s) will govern each session. As noted elsewhere, Program Directors appoint Session Chairs, usually from among the participants in a session of contributed papers. Symposia chairs may be identified in the proposal or designated by the Program Committee (Chair and Directors). The principal duty of Session Chairs, from the perspective of conference administration, is to manage the time and flow of papers/reports in the meeting. Since individual conferees selectively schedule their time to hear specific presentations, adherence to the published program timetable is essential. Session chairs must readily, although diplomatically, force participants to conform to their allocated time. If a listed paper or report has been cancelled or an individual does not appear to make a scheduled presentation, that time slot is not to be filled by advancing the meeting timetable as a whole or substituting a later paper. Vacant time should be filled by impromptu remarks, comments from the floor, or an unscheduled break (Appendix C). Session Chairs are required to report on their session to the appropriate Program Director by very briefly commenting on problems, recommendations, and non-appearances. Organizers should
draft a one-page questionnaire to provide to Session Chairs to aid in fulfilling this task (Appendix C). Guidelines must be provided every Session Chair and should include:

- Contact participants in advance to remind them of the time of their presentation
- Inform participants of their allocated time
- Familiarize yourself with the meeting room before the session begins
  ◦ Determine that all required equipment is present and working
  ◦ Locate light switches and other controls
- Check posted meeting room proceedings, edit if necessary
- Meet with the audiovisual monitor and review procedures
- Begin proceedings on time
- Maintain schedule as published in the program
  ◦ Do not revise timetable to accommodate a missing presentation
  ◦ Provide speaker with 5-minute warning
  ◦ If speaker’s time has expired, diplomatically inform the individual and after about 30 seconds move to the podium to take charge
- Submit brief report to appropriate Program Director
  ◦ Comments
  ◦ Recommendations
  ◦ Cancellations and non-appearances

**Session Setup Reminders**

**Session Room Arrangements**

Meeting rooms should be set up with at least a central aisle and two outside aisles to facilitate movement in and out of the room between papers. Sufficient space should be left at the rear of the room to accommodate standees and allow placement of additional chairs should the need arise. Water service should be available at the podium for speakers and in the rear of the room for attendees. Most hotels maintain a “hot line” to provide prompt service to freshen meeting rooms, replenish the water service, supply additional chairs, or attend to other needs. The attendant for each room should make sure that everything is in order before the session begins, and if not, notify the Local Arrangements Chair. At least one individual from the staff should also roam among the breakout rooms throughout the day, and especially between sessions, to ensure that all is properly set up.

Each room used for the presentation of papers should be outfitted with a lighted standing lectern, microphone, LCD projector, pointer (preferably a light or laser pointer), and screen

The Program Chair (or the Audiovisual Director, if appointed) needs to coordinate with the SHA Workshop Coordinator concerning room setup and audiovisual needs for the Continuing Education Workshops. Cost for these items are not a conference expense but arrangements are a conference responsibility.
Signs

Each meeting room, as well as every other function space, is to be posted with an easel or wall-mounted sign at the entrance identifying the meeting activity. Meeting room signs will list the session title and scheduled presentations and therefore must be changed readily. Session signs may be commercially printed, computer generated, or hand-drafted in a professional manner. Flip charts, prepared in advance to cover the sessions assigned to a particular meeting room, have proved effective at past meetings.

Smoking

Smoking is not permitted in any session. Smoking also is prohibited in all other officially convened conference functions.

PLANNING SOCIAL, ADMINISTRATIVE, AND SERVICE FUNCTIONS

Social Events

Another major element of the conference program is that of social events. Some functions are programmatic while others are optional. The Program Chair and Directors, usually with the Local Arrangements Chair as lead, must decide how programmatic commitments will be fulfilled and what optional functions will be offered. Closer to the conference, food specifics are worked out with the hotel catering staff. Those attending pay for all functions described below. Payment and ticketing procedures, therefore, must be incorporated in conference planning and registration, and a means to identify those who have paid must be devised. One way of making distinction about who has paid for what event is using color-coded dots on nametags, thus eliminating the need to have volunteers check against various lists (a time consuming process that leads to bottlenecks and inconvenience).

Banquet and Dance

The annual banquet is programmatic and scheduled Friday evening. The SHA banquet traditionally follows the Business Meeting with a cash bar set up in a prefunction area. Allowing at least an hour for the business meeting, the cash bar should begin no earlier than the close of the Business Meeting, about 6:30 PM. Banquet seating should begin between 6:30 and 7:00 PM. Normal attendance is approximately 200.

Past SHA banquets have ranged from outdoor barbecues featuring shucked oysters and boiled shrimp, through informal Mexican buffets, to formal dinners featuring colonial cuisine. Local dishes or historically based menus are favored and appreciated by conferees. Organizers are advised that it is necessary to offer at least two entrees, one of which is to be prepared for vegetarians. Other options, of course, may be limited by the menu available and catering costs. At several banquets, members have been able to purchase wine by the glass or bottle.
The annual SHA awards ceremony typically is held in conjunction with the banquet. Because seating may be limited and cost may prohibit many conferees from attending planners will need to have additional chairs placed at the back of the banquet hall for those who wish to attend the free awards presentations after dinner. Approximately 25–50 chairs, arranged theater-style, should be sufficient for that purpose, depending on the potential draw of the awards ceremony.

A dance that is free to all conferees, featuring live or recorded music, has frequently been scheduled after the banquet has been cleared, either in the same or an adjacent ballroom. If the same room is to be used, all necessary stage set up should be completed before the banquet seating. These events are open to all conferees and typically without admission fee. A cash bar is maintained until the event closes.

The committee, in consultation with the Headquarters Staff, is responsible for planning and arranging the following (also refer to Section III):

- Location, customarily the hotel
- Menu with both vegetarian and other options provided
- Setup arrangements and charges
- Type and nature of entertainment, if any, and charges
- Total event cost
- Cost per person, within traditional guidelines
- Cutoff date, based on the need to coordinate with catering service

Negotiation for banquet costs should be conducted prior to execution of the hotel contract. Service charges, corkage fees, other added charges, minimum number of dinners to be served, and added costs for additional dinners should be negotiated and the agreement reached be part of the written contract with the hotel. The Headquarters Staff is responsible for negotiating the hotel contract with input from the local committee and the Conference Coordinator.

**Roundtable Luncheons and Breakfasts**

Luncheons featuring roundtable discussions on various topics have been extremely popular. They may be supplemented by breakfast get-togethers when demand exceeds lunchtime space. In order to promote adequate participation in each discussion, no more than 10 roundtable discussions should be offered at a time. The room should be large enough to place the tables far enough apart to allow comfortable conversation at each table and each should be signed to identify the topic. Buffets are discouraged because of time. Hotel catering costs, however, may factor into the decision about meal particulars.

The meals of the discussion leaders are to be paid from roundtable revenues. The function must be self-financed; therefore, cancellation of some roundtables must be anticipated because of low advance sales for a particular topic.

These luncheons normally have been scheduled for one hour on Thursday and Friday, although Saturday has been employed as a scheduling option. Because of time constraints, this event usually is held at the conference hotel. The Program Chair and Local
Arrangements Chair normally jointly oversee this function. Program planners will need to plan the following:

- Schedule
- Number of roundtable topics to be offered, not to exceed 10 per day, and the days the functions will be scheduled
- Size of each discussion group (≤10)
- Identify the individuals who will lead each discussion group
- Menu with preference to plate luncheons should be selected over buffets to conserve time
- Setup arrangements and charges
- Total event cost
- Cost per person, within traditional guidelines
- Cutoff date, needed to communicate catering order to hotel

**Past Presidents’ Luncheon**

While not formally a conference function, the Past Presidents’ Luncheon affords senior members of the society’s leadership an opportunity to gather and discuss relevant issues. Generally, 15 to 20 individuals attend the function, which should be expected to last nearly two hours. This event usually is held on Thursday or Friday, at a convenient restaurant but, for functional reasons, not in the hotel. The following are considerations:

- Schedule
- Location
- Menu
- Setup arrangements and charges
- Invitations

The cost of this function is borne by the attendees and not the conference. This Board decision was made so that commensurate funds would be allocated as part of the conference budget to support the student reception (see more below). The Local Arrangements Chair works with the most recent Past President who has been off the Board for the past year to plan this event and has the responsibility for making these arrangements and handling invitations to the event. The Past President going off the Board at this meeting and the new Past President are not among those invited.

**Receptions**

Receptions are customary events during the conference. An opening reception traditionally is held Wednesday evening, and a pre-banquet cocktail event is scheduled on Friday evening. Both of those affairs normally are held at the hotel as cash-bar functions. If the opening reception is held off-site, its location should not be more than 30 minutes away from the conference hotel. Also, it is important to provide information to attendees if the reception fare is equivalent to dinner or on the lighter side.
Other receptions may be planned for Thursday and Saturday nights, either at the hotel or some other locations of interest. These functions may vary from simple no-host affairs with cash bars to the Official Government Reception at Vale Royal, the Prime Minister’s residence, in Jamaica. Open house functions at museums and galleries normally are very well attended. If transportation is required, it should be scheduled on a reservation basis or arranged to run continuously during the event. The fee for receptions needs to cover transportation costs as appropriate. Meeting organizers, therefore, must plan the following:

- Number of receptions
- Schedule of receptions
- Location(s) of receptions
- Type of event, no-host or sponsored
- Setup arrangements and charges
- Transportation requirements, if applicable, and charges
- Total event charges
- Cost per person, if applicable

Additionally, conference organizers must remember to include non-alcoholic beverages and fare that is suitable for children.

If receptions are provided by a professional supplier, contracts have to be concluded in a timely manner to permit the inclusion of information in the preliminary program and must be in concordance with budget plans. The Headquarters Staff is responsible for final negotiation and for executing all contracts.

Past Presidents’ Student Reception

In addition to those receptions mentioned above, recent years have seen the addition of the Past Presidents’ Student Reception. This event is normally held immediately following the Student Forum. Generally of short duration and immediately preceding and not in conflict with a reception open to all attendees, this event provides an opportunity for students to mingle with the past and current SHA leadership. Since this event has its origins in a recommendation from the past presidents to reallocate funds traditionally earmarked for their luncheon to support a student reception, the conference should bear the cost of modest beverage and snack foods. The expected cost of this reception is about $2,000.

Tours

Tours are traditional functions of the conference. They are designed to showcase local points of interest and generally are conducted before the beginning and at the end of the conference, or for part of a day on Wednesday before most events begin. Tours also might be offered during session proceedings, particularly those designed principally for individuals accompanying conference attendees. Any tour scheduled during the proceedings, however, should be of brief duration and not conflict with the business meeting or the presentation of society awards. Historic districts and properties, museums, galleries, and, of course, archaeological sites, have been popular attractions during past meetings.
The number, kind, and duration of tours can vary significantly from meeting to meeting depending on the availability of local sights/sites, community interest, and weather. Tours have varied from one-hour walking tours of historic districts to all day excursions visiting a series of sites. Pre- and post-meeting excursions utilizing nearby resorts also should be considered by organizers. Planning, imagination, local, and staff resources will dictate the number and itinerary of a meeting’s tours.

The Site Committee should:
- Collect pre- and post conference excursion information
- Identify potential tours to be held during the meeting
- Select destinations
- Coordinate with property managers
- Determine transportation needs and charges
- Establish group size
- Schedule days and times
- Appoint tour leaders
- Estimate costs, if any
- Compute a per person fee, as applicable

If tours are provided by a professional supplier, contracts have to be concluded in a timely manner to permit the inclusion of information in the preliminary program and must be in concordance with budget plans. All contracts must be negotiated and executed by the Headquarters Staff.

Planning and Scheduling Administrative Functions and Services

Program planners must plan for and integrate a series of administrative functions and services with the sessions and social events. Planning and administration of these functions and services are the responsibility of various committee chairs and, therefore, require close coordination among and between the Program Chair, Local Arrangements Chair, Registration Chair, Exhibits Chair, the Headquarters Staff, and the SHA Workshops Coordinator. Space and planning criteria have been discussed in Sections III, VI, and VII where organizers will find appropriate guidelines. These functions and events, with cross-references, are listed below.

- Administrative Functions
  - Annual Business Meeting (III)
  - Awards Presentations (VII)
  - Board and Committee Meetings (III)
  - Caucuses and Workshops (III, VII)
- Service Functions
  - Child Care (VII)
  - Employment Center (III, VII)
  - Exhibits Center (III, VII)
  - Registration Center (III, VI)
DEADLINES

The following table, Table 7, provides a timeline for planning the conference. *This timeline is not be used as a substitute for studying the contents of this manual but as a quick reference guide to aid conference organization and planning.*

Four years prior to proposed conference date, interested organizers are to present to the Conference Coordinator a draft proposal for review no later than 1 November. The Conference Coordinator reviews the draft and provides comments within six weeks. The organizers then revise the proposal and return it to the Conference Coordinator no later than the following March. The Conference Coordinator provides a copy of the proposal with comments at least 30 days in advance of the Board’s spring meeting to the Headquarters Staff for distribution. The Board may take up to six to nine months to make a decision. During this timeframe, they may ask questions and request changes.

Three years prior to the conference, the Site Committee needs to be finalized and remaining positions filled. The committee should attend all intervening conferences in order to learn the “ropes,” and talk to conference organizers to determine what went smoothly and what had snags.

Also, during the third year, it is important for the Headquarters Staff to finalize hotel negotiations and develop an acceptable contract for the SHA President signature. Remember that the SHA commitment to the conference is not firm until the President has signed the hotel contract.

Concurrent with the hotel negotiations, the locality needs to be surveyed for possible tours, restaurants, and other points of interest. This information can be included in the newsletter updates about the conference once it is relatively certain to be included in conference activities.

Meeting announcements are as follows:

- The call for papers is prepared in January, one year before the conference, and provided to the SHA Newsletter Editor for publication in the March newsletter.

The preliminary program should be compiled by 1 August and transmitted to the Newsletter Editor for publication in the fall issue no later than mid-August. Electronic registration should be available for use on 1 October.

On 31 August preceding the conference is the last date for the Program Chair to notify presenters that their presentation is accepted or rejected. This date is about two weeks after the Presidential Panel decision regarding any questions of ethical content of a presentation.

Individuals may withdraw presentations without penalty until the mid-October date selected by the Conference Committee in consultation with Headquarters staff. Following this date, organizers should make whatever revisions are necessary to sessions and complete whatever local arrangements remain. All meeting components must be
integrated into the final conference program no later than 1 December. Production and printing of the final program, abstracts, and other conference materials such as information sheets and tickets must be accomplished by 15 December.

From the receipt of any funds until after the conference closing, there are monthly financial records to be provided by the Headquarters Staff to the local committee, the Conference Coordinator, and the SHA Treasurer. Provided that a final hotel bill has been received, Headquarters staff will provide preliminary financial data on the conference by 15 February to the SHA Treasurer, the Conference Coordinator, and local committee. In May, following the conference, a financial summary is to provided. By the end of June, all records are to be provided to the SHA Secretary for archiving.
TABLE 7. DEADLINES AND CONFERENCE TIMELINE
<table>
<thead>
<tr>
<th>PHASE 1</th>
<th>PHASE 2</th>
<th>PHASE 3</th>
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</thead>
<tbody>
<tr>
<td>Preparing The Conference Proposal</td>
<td>Formalize Committee &amp; Negotiate Hotel</td>
<td>Meeting Announcements</td>
</tr>
<tr>
<td>Tasks:</td>
<td></td>
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<tr>
<td>1 Prepare Draft Proposal for SHA Conference Committee Chair Review by December no later than 4 years prior to Proposed Conference Date (by December 2000 for the January 2004 Conference)</td>
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<tr>
<td>2 Revise Proposal In Accordance With Comments Present best contract to SHA President</td>
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<tr>
<td>3 Present Revised Draft to SHA Conference Committee Chair Conduct venue survey for tours, event locations, restaurants, etc.</td>
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<tr>
<td>4 Conference Chair submits 30 days in advance of meeting to SHA Business Office for Distribution to SHA Board at Spring Meeting.</td>
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<tr>
<td>5 Board Approves Conference Proposal as is or with revisions, or disapproves. Can take 6 - 9 months.</td>
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<tr>
<td>Tasks:</td>
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<tr>
<td>1 Fill remaining open key committee positions within 6 months of site acceptance</td>
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<tr>
<td>2 Complete hotel negotiations and present best contract to SHA President</td>
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<tr>
<td>3 Finalize institutional support arrangements in following March issue</td>
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<tr>
<td>4 Conduct venue survey for tours, event locations, restaurants, etc.</td>
<td></td>
<td></td>
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<tr>
<td>5 Status reports to Conference Coordinator for inclusion in annual and mid-year committee reports</td>
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<tr>
<td>Tasks:</td>
<td></td>
<td></td>
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<tr>
<td>1 2 yrs before Conference: First call for Papers to Newsletter Editor in October for publishing in December newsletter</td>
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<td>2 December 2 yrs before conference send to Newsletter Editor for publishing</td>
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<td>3 Submit announcements quarterly thereafter with updated news</td>
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<tr>
<td>4 December two years prior to the conference announce in other publications</td>
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<tr>
<td>5 Status reports to Conference Coordinator for inclusion in annual and mid-year committee reports</td>
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**Diagram:**
- Start: 4 yrs. before conference date
- Board Approval within 6 - 9 months
- Formalize Site Committee Negotiate Hotel and Present Contract Conduct Venue Survey
- Submit all meeting announcements to Newsletter and to other publications, thereafter with updates
- Start 2 yrs. before conference date
### PHASE 4
### Year Before Conference Tasks

<table>
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<tr>
<th>Tasks:</th>
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<tbody>
<tr>
<td>1 Detailed Conference Report to Board at conference Business Meeting</td>
<td>1 Mid-March, Exhibits Coordinator sends draft Meeting Announcement to Conference Chair</td>
<td>1 Mid-May Conference Chair responds to Exhibits Coordinator with list of local groups to be added to meeting announcement mailing to Exhibitors</td>
<td>1 August 1 Preliminary Program is compiled</td>
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<tr>
<td>2 Final Call for Papers to Editor for Publication in March Newsletter</td>
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<tr>
<td>3 At Conference, review with organizers what went well and what did not</td>
<td>2 Begin development of Call for Papers</td>
<td>2 deleted mailout to members of call for papers</td>
<td>2 Headquarters Staff prepares plan for Exhibits Center by mid-August</td>
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<td>3 deleted seed money reference</td>
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<tr>
<td>January</td>
<td>March</td>
<td>May</td>
<td>June</td>
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**PHASE 4**

**Year Before Conference Tasks: Continued**

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<th>Tasks:</th>
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</thead>
<tbody>
<tr>
<td>1 Prepare preregistration Package and Preliminary Program for Fall Newsletter by August 15</td>
<td>1 October 1, membership to have received Preliminary Program and Registration packet</td>
<td>1 During November, the final program is developed and all arrangements for tours, etc. are finalized</td>
<td>1 Conference program and abstract are finalized and sent to printers</td>
<td>1 Brief conference at Business Meeting on preliminary conference statistics</td>
</tr>
<tr>
<td>2 Business Office Mails announcement to potential exhibitors</td>
<td>2 Web site begins to receive electronic registrations</td>
<td>2 Process registrations and develop preliminary numbers for event attendance, inform other chairs</td>
<td>2 The program and all other conference materials are printed</td>
<td>2 Enjoy the conference, your prior planning has paid off and all conferees are ecstatic by the conference</td>
</tr>
<tr>
<td></td>
<td>3 Abstract refunds available up to October 15</td>
<td>3 Registration packages are filled for preregistrants</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>4 After October 15, Local Arrangements Chair makes adjustments based on anticipated attendance, other chairs and directors make final plans and arrangements</td>
<td>4 On-site registration packages are prepared</td>
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<td>5 Commemoratives are packaged for preregistrants</td>
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<td></td>
<td></td>
<td>6 All volunteers are contacted and trained</td>
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</table>

| September | October | November | December | January |

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The conference is a success
Phase 6
After the Conference Responsibilities

Tasks:
1. Complete payment to vendors
2. Take a vacation

Tasks:
1. Headquarters Staff sends Financial Report to Conference Coordinator and SHA Treasurer before end of May
2. By May 1, send Final Conference Report to Conference Coordinator for review. Upon comment submit report to the Board

Tasks:
1. All conference records forwarded to SHA Secretary for archiving

Post-Conference

February  May  June

FINISH
VI. REGISTRATION

INTRODUCTION

One of the major responsibilities of the Headquarters Staff is to:

- Produce the preregistration packet with input for the local committee;
- Receive and process abstract submissions and preregistration forms and payment;
- Supervision of on-site registration during the conference with support from the local committee and conference volunteers.

The Headquarters Staff also will be called on to provide summary information on registration numbers for events such as the tours, lunches, banquet, etc., before and during the conference.

Registration is a central concern of conference planning. It is complex, unforgiving, and the needs and schedule of registration will at times drive other aspects of conference planning. Close coordination is essential so that registration has the information it needs, in the form it is needed, and when it is needed. Likewise, the registration process will generate critical information of use in other areas of planning. With the Headquarters Staff overseeing registration, it is assumed that the registration functions and responsibility of the local committee will be less burdensome.

Preregistration as Marketing

The preregistration packet is the only detailed description of the conference that the entire SHA membership will receive other than that contained on the SHA website or link thereto. For many, the preregistration data sets the tone for the meeting, which becomes a deciding factor on whether or not to attend. The preregistration package is published in the Fall Newsletter, and is no longer mailed to potential registrants. It is the responsibility of the local committee to work with Headquarters staff to design and produce the preregistration information that will appear in electronic and paper conference registration documents.

Electronic Registration

Beginning with the Long Beach Conference in 2001, electronic registration via the conference web site, linked to the SHA web site, became available. The Headquarters Staff now handles the electronic registration process based on the information provided to it by the local committee.
On-Site Registration

For those who choose to attend the conference, on-site registration is the first aspect of conference organization that they encounter. This proverbial first impression of the conference can be decidedly positive or negative. Once again, time and money used to prepare for efficient on-site registration is a good investment toward the success of the conference.

ESTABLISHING A SCHEDULE

Establishing and maintaining a detailed schedule for preregistration and on-site registration planning is essential. The entire conference team must be aware of this schedule and especially the deadlines for providing information to the Headquarters Staff. The major events scheduling must accommodate are:

- Abstract submissions;
- Publication of preregistration information;
- The advance registration deadline or cut-off; and
- The conference itself.

These events and their scheduling needs are reviewed below.

Abstract Submittals

Individuals who plan to present a paper at the conference must preregister for the meeting. The preregistration fee must be submitted with their abstracts. The abstract and accompanying preregistration fee will arrive in the late spring, and the Headquarters Staff must track these payments, as well as late fees such as past-due abstract submittals. Payment tracking will be handled by the Headquarters Staff, which will in turn provide this information to the appropriate committee chairs.

Publishing the Preliminary Program and Conference Registration Information

Preliminary program and conference registration information must be compiled by August 15 to be available for publication on the Fall Newsletter. Because the registration information describes the conference in some detail and allow people to sign up for all conference events, many aspects of conference planning must be finalized before it can be published. In order to compile the registration notice, the following information will be required:

- Registration fees;
- Roundtable luncheon and/or breakfast topics, menu (to establish cost), and price;
- Banquet menu and price;
- Tour options, dates, times, and prices;
- Commemorative sales options and prices;
- Hotel registration forms;
• Conference airline or travel agent;
• Ground transportation information;
• Day care availability;
• Dance, open house, and reception plans;
• Special meetings such as the ACUA photo contest and workshops
• Preliminary program
• Deadline for refunds

Whomever is in charge of each of these arrangements must be aware of the effect that their planning has on registration planning.

Preregistration and Refund Requests

The advance registration deadline should be approximately one month prior to the conference. Historically, this deadline has been set as December 1. This deadline will mark the peak workload for processing advanced registration forms. Registration forms will continue to arrive after this date but will decrease in frequency. As with the submission of abstracts, payment methods will abound. Procedures must be clearly established to record incoming material and payments.

A deadline for refunds should be set and printed on the registration form and be included on the electronic registration page. This deadline should expire at least a week before the conference. This deadline is separate from the mid-October deadline established for presenters.

Designing the Registration Form

The design of the registration form is critically important to a successful registration process. If it is not designed well, it will attract error. It should be exceedingly clear and concise, designed for database entry, and must contain:

• Name (Last, First, Middle)
• Affiliation
• Address
• Phone Number
• Nametag block (a space to ask each individual to list precisely how they want their nametag to read)
• Registration alternatives and deadlines (both advance and regular rates should be listed)
• Place to subtract registration fees submitted with abstracts
• Roundtable luncheons (first choice and alternatives) and price
• Banquet time, tentative menu, and price
• Tour details and price
• Commemorative items, including sizes available, a place to order a particularly size and color, and price.
• Refund instructions and address
• How to make checks out, to charge their fees, or to register via the website
• Return address

Advance registration fee alternatives should include:
• SHA member, advance and regular
• SHA student member, advance and regular
• Non-member, advance and regular
• Non-member student, advance and regular
• Spouse/Accompanying Guest

One-day rates should not be listed on the preregistration form to avoid abuse of these rates; however, they should be available at on-site registration. The SHA Board has determined that non-member rates must be at least double the member rates (Section IV).

PROCESSING REGISTRATIONS BEFORE THE CONFERENCE

Shortly after the preliminary program and conference registration information have been published, completed registration forms and payments will start to return. All registration forms and payments are to be sent directly to the Headquarters Staff to be processed. As they are received, registration forms will need to be date-stamped. The date stamp ensures fairness in assigning limited space in the roundtable luncheons and tours, and in enforcing the deadline for advance registration.

As registrations are processed, summaries should be generated periodically and distributed to the local committee. Close coordination with the Headquarters Staff to establish a reporting schedule will be necessary. As registrations are received, it will also be necessary to track closely any items that are available in limited quantity. Most notable here are the roundtable luncheons and tours. These often sell out well before the conference and they are filled on a first come, first served basis. If a particular tour is very popular, there may be sufficient time to arrange for the necessary transportation and tour guides to accommodate the received requests. By doing this, additional revenue is gained for little cost, and a willingness to accommodate conferees is demonstrated.

Incomplete registration forms are to be immediately sent back to sender for completion. This is most easily done by fax or email. Sending the forms back for completion helps insure that the necessary information is received and puts the responsibility for completing applications correctly on the shoulders of the person filling out the form. Incomplete forms include missing payment.
DESIGNING AND PRODUCING THE REGISTRATION PACKETS

The registration packet is what conference attendees will receive when they arrive at the conference and after they have paid all the pertinent fees. It contains:

- An itemized registration statement/receipt
- A program book (Appendix C)
- An abstracts book (if separate from the program book)
- Nametag and holder (clip or pin back holders and hanging holders have both been used at recent conferences)
- Ribbons for past presidents, current board members, Harrington/Ruppé/Cotter awardees, Committee Chairs conference staff and volunteers (maybe available from the Headquarters Staff, if not they need to be obtained locally)
- Tickets for banquet, luncheons, and tours
- Commemorative items

The packet may also contain a variety of optional materials:

- Coupons for local restaurants, bars, etc.
- Brochures on local attractions
- Lists of recommended restaurants, bars, etc.
- Conference information circulars
- Map showing the local vicinity of the conference

Generally, a registration packet is assembled and placed in a 9 x 12 in. envelope that may be custom printed at the discretion of the committee and Headquarters Staff. Not all of the listed materials will always be placed in these envelopes. Very often, to avoid overstuffed envelopes, registration volunteers hand out programs/abstracts books and nametag holders separately. Also, commemorative items, such as T-shirts, that do not conveniently fit in envelopes will require a separate package but are to be handed to registrants as they arrive at registration. Registration packages are prepared shortly before the conference by Headquarters Staff staff, local committee staff, and volunteers.

Nametags

Attractive name tags with bold, easily read names and institutional affiliations are essential. These can be produced in a variety of ways, but they should be 3 x 4 in. in size with the blanks printed on 8 x 11 in. stock for use with a laser printer for on-site registration. Further, these sheets can be purchased microperforated so that they can be easily separated and placed in holders. Consistently produced, high quality nametags are sincerely appreciated. Printing nametags is the responsibility of the Headquarters Staff.

Assembling Packets for Preregistrants

Packets for preregistrants will contain their statement and whatever special items they have requested (tickets, etc.) or are entitled (ribbons, etc.). Packets should be labeled on the outside with the registrants name and filed alphabetically by last name. Standard storage
boxes make it easy to store packets alphabetically and to transport the packets to the conference site.

Commemorative items are usually too large to fit into the preregistration envelopes and should be prepackaged. These items have already been sold and prepackaging will ensure that they are not inadvertently sold to another individual. Prepackaging also will make their distribution easier. At recent conferences, commemorative items were placed in a paper sack labeled with the individual’s name. On the regular registration envelope, a large, bright adhesive dot was placed next to the individual’s name alerting registration volunteers that they had also purchased commemoratives and that they need to be found and provided to the registrant.

Assembling Packets for On-Site Registration

Packets for on-site registration will consist of unlabeled envelopes filled with generic information. These will be given to registrants along with their statement/receipt and whatever unique items they may have requested or to which they are entitled.

REGISTRATION AT THE CONFERENCE

Registration at the conference starts on Tuesday and continues through noon on Saturday. Wednesday hours usually extend into the early evening whereas those on subsequent days are 7:30 AM until 4:30 PM. The Registration Center should be set up and organized for business on Tuesday evening.

While it is anticipated that the Headquarters Staff will handle on-site registration assisted by registration volunteers from the local conference, a number of key volunteers will be needed on Tuesday to set up the center. The center will be the busiest on Wednesday and on Thursday morning when most conference attendees register. After Thursday morning, fewer individuals can handle the workload.

Several responsible individuals should be recruited to staff the center and assist Headquarters StaffI and these individuals should be trained in all registration duties. For peak times, other volunteers will be needed and they should be trained in their specific assignments.

The location of the Registration Center will vary depending on the conference site. It works best if the Registration Center is located close to the Exhibit Center/Bookroom so that membership questions can be quickly and efficiently resolved. Further, if at all possible, registration should operate from a room or area where the entrances can be locked. This will allow the registration tables and equipment to remain set up continually (preventing the need to take it apart and set it up daily, which is exhausting), and will allow registration staff the ability to work before and after hours without being disturbed.
The Registration Center will be a central reference point for questions. Because of this, if possible, the Registration Center and Conference Office should be very nearby each other. The center, however, should not be a place where idle staffers gather to socialize.

Registration Center personnel must be able to communicate with other conference staff, the SHA Headquarters Staff, and the hotel. For that reason, the center should be equipped with a telephone or a two-way radio. A telephone or radio should also be placed at the SHA on site Business office to facilitate direct communication with registration.

The Registration Center should be set up with a counter or tables designed to handle advance and on-site registrants; it is best to separate these two types of registrants. Preregistrants need only pick up their packets and, in some cases, pay any fees due. On-site registrants will need to complete the appropriate forms, make payment, and receive their packet once the receipt and nametag have been prepared. It is strongly recommended that there be a clear separation between on site and preregistration areas.

Headquarters staff should consider including a “trouble” desk in the organization of the center. The “trouble” desk would handle problems encountered during or resulting from the preregistration process, e.g., refunds, balances due, incomplete registration information, receipt problems, and lost registrations. Individuals with “problem” packets or detailed questions would be referred to this desk for service. The purpose of the “trouble” desk is to smooth the registration process and decrease the time that all conferees spend at the registration desk.

Equipment needed at the Registration Center will include at least two computers, one of which may be attached to an ink jet or other printer (for statements) but the other should be attached to a laser printer (for nametags). Additional computer equipment is desirable in the event of failure and to decrease turnaround time.

Other equipment will include standard office supplies such as staplers, pencils, pens, staple removers, paper, trash baskets, etc. A large freestanding corkboard should be placed at the Registration Center for important announcements and for messages, or a separate message center should be established.

Preregistrants

Those who have registered in advance will need, most often, to only to pick up their packets. In Kansas City, registration opened at 10:00 AM to allow preregistrants to pick up their packets after check-in, with full registration services starting later in the day. This prevented long lines from developing despite the fact that 80% of the attendees chose to preregister. Workshop attendees appreciate being able to pick up their packages early Wednesday morning.

The ACUA meets on the Tuesday prior to the conference and the SHA Board meets on Wednesday. The packets for preregistered members of these bodies should be hand delivered to their prospective meeting rooms immediately prior to the start of their meetings.
On-Site Registration

On-site registration is the most involved of the on-site processes. In order to facilitate this step, a special on-site registration form should be developed that is a simplified version of the preregistration form. This form removes obsolete options and also distinctly identifies on-site registrants in the paper files.

To effect on-site registration, an individual will complete a form and submit payment. This form should be given to a volunteer to enter the information into the database and generate a receipt. Nametag information should be given to another volunteer who will produce a nametag. If the individual purchases tickets or commemoratives, these need to be assembled. This may take a moment or two. Registrants should be directed as to when to return so that they can pick up their materials and nametag should on-site registration be crowded.

On-site registrants will be able to purchase luncheon tickets, banquet tickets, and tour tickets as available. Cut-off times for these ticket sales should be established in consultation with the hotel, and volunteers should be aware of any options that are sold-out or cancelled. The key to having this run smoothly is to be able to quickly generate counts of those registered for these events so they are not oversold.

Registration and Other Fees—A Reminder

Refer to the section on awards so that registration perks can be coordinated with the Awards Coordinator. It is suggested that the awardees’ packages be provided in advance to the Awards Coordinator to handle. The Awards Coordinator would then be responsible for returning any fees due to the Registration Chair.

Caveat

It is impossible to please everyone, so don’t even try. The goal should be an efficient, logical, and professional approach to conference registration built on the careful anticipation of problems. Registration should be flexible enough to deal with the human condition and operated by friendly but resolute individuals.
VII. ADMINISTRATIVE AND SERVICE FUNCTIONS

INTRODUCTION

A series of meeting functions are designed to support the administrative needs of the society, provide services to conferees, facilitate on-site management and administration of the conference, and supply essential meeting equipment. Administrative activities usually are single events while service functions continue for the duration of the conference. Both administrative and service functions may crosscut areas of responsibility. Headquarters staff will be responsible for overseeing and coordinating most of the space or service requirements discussed in this section in close cooperation with the Conference Committee. Close coordination among conference chairs, directors, and staff is essential.

Administrative functions include:
- Annual Business Meeting
- Awards Presentation(s)
- Board and Committee Meetings
- Workshops and Caucuses

Service functions are grouped as follows:
- Administrative Services
  - Registration Center
  - Conference Office
- Session Services
  - Poster Sessions
  - Preview Room
  - Audiovisual Equipment
- General Services
  - Child Care (Pat – Do we provide this? It hasn’t been offered at the past two conferences.)
  - Employment Center
  - Exhibits Center

ADMINISTRATIVE FUNCTIONS

Annual Business Meeting

The society’s annual Business Meeting takes place on Friday and ordinarily is scheduled to begin around 4:30 PM. Friday afternoon sessions, therefore, must be completed in a timely manner. No other conference function can be scheduled opposite this event. If the function space has been broken out for sessions, the area must be reset before the Business Meeting convenes. Setup requirements are outlined in the Hotel section (Section III)
Awards Presentation

Introduction

The society has six classes of awards. Refer to Section IV, the Chapter on Finances and the subsection on Awards for a complete listing. The *J. C. Harrington Medal in Historical Archaeology*, named for the excavator of Jamestown and first recipient, is the oldest and most distinguished. This award, first conferred in 1982, was established to recognize a member’s scholarly contribution to the field of historical archaeology. The *Carol V. Ruppé Distinguished Service Award*, first given in 1990 to the former exhibits coordinator and award namesake, was created to recognize a member for both long and distinguished service to the society, or for outstanding specific achievements. The *Award of Merit* was established in 1991 to recognize any individual or organization for specific achievements furthering the goals of historical archaeology. The *John L. Cotter Award*, named for the society’s first president, was created in 1998 to recognize notable achievements by members early in their careers. The James Deetz Award was established in 2004 to honor colleagues who have produced a notable, well written book on archaeology that appeals to a broad, crossover audience of readers. In recent years, the awards have been expanded to include the Student Paper Prize and Dissertation Prize.

The society’s Awards Committee Chair coordinates the selection and presentation of these awards. Awards are typically presented in a ceremony held in conjunction with the banquet or are spread out and awarded at different conference functions. Per guidance of the SHA Board at their January 2000 meeting, the awards ceremony is to last no longer than one hour.

Conference and Award Committee Coordination

Conference organizers must interface with the society’s Awards Committee Chair to plan, schedule, and implement the awards ceremony (Section IV). The following tasks are completed in coordination with the SHA Awards Chair by the Conference Chair, the Program Chair, or Local Arrangements Chair, as appropriate:

- Scheduling the Awards Ceremony on the program
- Arranging any special presentation needs
- Including honoree(s) name(s), address(es)/affiliation(s), and a brief description of accomplishments in the printed program
- Confirming the attendance of honoree(s)
- Assisting with accommodations and registration
- Providing a hospitality escort to society events and functions, including airport transportation, if necessary

The presentation of society awards, which normally occurs immediately following the banquet, is a prestigious event and should not be scheduled against any other conference function.
Board and Committee

Meetings

The SHA and the ACUA boards will require space for meetings during the conference. Headquarters Staff will contact and consult with the SHA and the ACUA board presidents concerning needed arrangements.

Various standing and ad hoc committees of the society also require meeting space during the conference. Chapter I of this manual has a draft meeting schedule to provide a framework for coordinating with the SHA President and the committee chairs. The same room reserved for Board Meetings frequently can be used for such committees meetings if scheduling permits. Board usage takes priority. Occasionally, the presidential suite is used for small committee meetings. Setup and catering requirements are described elsewhere (Section III).

The local committee in cooperation with Headquarters staff must schedule space for each committee meeting. An experiment at the Sacramento meeting involved scheduling all committees except the SHA Board and ACUA Board at the same time and in the same space. That experiment failed because committee members often belong to more than one committee, and the meeting was scheduled opposite symposia. The plan is to schedule the committees in two shifts: 3:00 p.m. – 3:45 p.m. and 3:45 p.m. – 4:30 p.m. and to not have any paper presentations offered at that time. The Annual Business meeting will follow the committee meetings in the same room. The reasoning for this format is to have more committee members attend the committee meetings and to have more people attend the Annual Business meeting as well.

Workshops and Caucuses

Various special interest groups may request space for business meetings, discussion sessions, or open workshops, as well as the SHA sponsored Workshops. Among those most regularly asking to be accommodated are Urban Archaeology Group, the African American Study Group, and the Register of Professional Archaeologists. Although such activities are not strictly programmatic, they should be provided suitable space and listed in the program. The Conference Chair should be sure that such groups are notified as part of the general call for papers to submit their requests in a timely manner. Group representatives must advise the conference Program Chair of their preferred meeting time, anticipated attendance, room set up, and any audio-visual needs.

The Workshops are another fundraising function of the SHA and, as a result, there are no programmatic or planning responsibilities for the site committee other than to assist in arranging for space, audio-visual equipment, refreshments for breaks, and to include the preprinted workshop information and registration in the preregistration package. The SHA Secretary-Treasurer and the Continuing Education Coordinator set the fees for these workshops. Since the SHA is firmly committed to sponsoring these workshops, there cannot be other workshops that charge a registration fee. The costs associated with these workshops are paid for directly by the SHA and are not part of the conference budget.
SERVICE FUNCTIONS

Administrative Functions

Registration Center

The Registration Center must be in a convenient, accessible area. Many conference hotels have a registration alcove in the lobby near the front desk, and such facilities can be quite serviceable, especially if the room can be secured when unattended. It is highly recommended that the registration center be located in an area that can be secured when the center is closed. This prevents the early morning setup and evening breakdown from being a necessity—a real energy drain when the registration personnel are already busy. In some cases, however, it may be necessary to use a rollaway registration counter. This can be set up in a prefunction area near the actual meeting rooms and moved at will, but registration materials and equipment also will have to be set up, taken down, and stored each day.

The Registration Center must be adequately lighted, have sufficient counter space, and be served by telephone or radio communications. Electrical outlets, and adequate numbers of chairs and waste receptacles are necessary. Readers should also are refer to “Registration at the Conference” (Section VI) and comments on setup (Section III).

Conference Office

The conference office functions as the management and information center for the meeting staff. Ideally this facility will be incorporated with the Registration Center (see “Registration at the Conference” in Section V). If, for whatever reason, this facility cannot be integrated with the Registration Center, then space must be reserved (Section III). The office is reserved and set up from Monday morning through Sunday noon.

SESSION SERVICES

Poster Sessions

Poster sessions are prepared presentations developed as displays combining text and graphic illustrations. Poster Sessions are arranged by the Program Directors in coordination with the Program Chair and are subject to the same submission guidelines as papers. If a poster session(s) is submitted and accepted, arrangements must be made for its presentation. The Program Chair must consult with the Local Arrangements Chair to identify and reserve space and determine setup needs for this function. If at all possible, the session should be scheduled in an area separate from, but near, the Exhibits Center. During the meeting, the local committee’s Exhibits Director coordinates poster session(s) setup and oversees daily management. If the proposed session is comparatively small, the Local Arrangements Chair should consult with the Exhibits Coordinator about integrating the posters with other displays scheduled for the Exhibits Center/Bookroom.
**Speaker Ready Room**

A room should be provided wherein meeting participants presenting papers may review their presentations. The room should be equipped with appropriate power and extension cords, a table, and two chairs. Since SHA offers LCD projectors in the meeting rooms, speakers can use the Speaker Ready Room to review their Powerpoint slides on their own laptops as well as to coordinate with their session chairs to load up their presentations onto one laptop. A volunteer charged with ensuring security of the equipment and resolving any problems that may arise should staff the room. The Speaker Ready Room should be open Wednesday afternoon through Saturday afternoon. Provision should be made for use during evening hours, if requested, and scheduled in advance by one or more participants. The program should provide information on the location of the preview room, hours of operation, and who to make arrangements with for evening use.

**Audiovisual Equipment**

Past Conferences provided an array of audiovisual equipment for presenters upon request. The cost of audiovisual equipment has sharply increased in recent years, at the same time that most presenters moved to Power Point presentation. By Board decision, conferences no longer provide slide projectors, overhead projectors or any other audiovisual equipment besides LCD projectors, microphones, laser pointers, and screens. The conference does not provide laptops, and symposia organizers are encouraged to provide laptops for their session and to have presentations preloaded before the session begins.

*Equipment Sources*

Most conference hotels either have an in-house audiovisual department or maintain a working relationship with a local audiovisual equipment rental business. Normally all necessary, or any supplementary, equipment can be obtained from these sources. Meeting organizers must determine relatively early in the planning process what strategy will be used to supply this equipment. Renting all, or the majority, of equipment necessary from the hotel or its allied agent is recommended. While costs are very high, equipment quality usually is very good and technical assistance during the meeting is readily available.

*Equipment Needs and Scheduling*

The following audiovisual equipment has been used for presentations at recent meetings and is likely to be required for future meetings:

- Laser pointers (Usually passed on from one conference to the next)
- Microphones
  - Podium-mounted
  - Floor-stand
- Projectors
  - LCD Projectors
- Screens
Equipping meeting rooms with a set of standard audiovisual aids will enhance the quality of the conference and reduce daily management requirements. Each meeting room should be set up with the following for every session:

- Podium microphone
- LCD projectors
- Laser pointer
- Projection stand/table
- Screen.

**Audiovisual Staff**

Audiovisual services during the meeting are the responsibility of the Audiovisual Director. This individual supervises and works with a staff to provide and service audiovisual aids during the meeting. Normally, each meeting room is staffed during all sessions by a volunteer monitor who operates projectors, dims lights, and promptly reports any equipment problems to the Audiovisual Director. It is most helpful for a smoothly running conference for the Audiovisual Director and the session monitors to have a radio or wireless phone for communication purposes.

**GENERAL SERVICES**

**Childcare**

Childcare is a standard service made available to conferees. Meeting organizers will need to identify one or more childcare providers who will offer such service during the conference and to whom conferees may be referred. Childcare providers must be licensed, bonded, and insured. Organizers must ensure that the SHA assumes no liability in connection with the childcare provider. The cost of this service will be borne by the attendee who requires the service.

Many conference hotels offer such service in-house or maintain a working relationship with independent childcare provider(s). A minimum number of participants usually are required. Once identified, organizers need to communicate rates charged, days and hours available, and arrangement criteria to the membership. This information normally is disseminated with the preregistration packet.

**Employment Center**

An Employment Center traditionally is maintained at the conference as a service to the membership. Supervision and staffing of the center are the responsibility of the society’s Employment Coordinator. Meeting organizers are responsible for reserving the space and room setup. The SHA Employment Coordinator should confer with the Local Arrangements Chair and Headquarters staff to determine if there are special requirements.
Ordinarily this function is largely self-sustaining. Employment Center space and setup requirements are outlined in the section on the Hotel (Section III).

Exhibits Center and Bookroom

Introduction

The SHA Exhibit Center, traditionally called the “bookroom,” is a standard and important component of the conference. In recent years, the function of this facility has evolved from that of a book display area, primarily, to a multi-purpose show and service space. While publications contributed by local, regional, and national presses remain the core element of the center, items such as small-scale poster displays, freestanding agency exhibits, and equipment demonstrations have become increasingly common and important aspects in its operation. In addition, the society maintains a membership service desk in the center. (QUESTION; Is this the responsibility of the Headquarters staff or local arrangements?)

Coordination and Scheduling

Coordination between the Conference Chair, Program Chair, Local Arrangements Chair, and the Headquarters Staff will be necessary in planning and operating the Exhibits Center. The Local Arrangements Chair will need to communicate with the Headquarters Staff in order to discuss hotel space, setup arrangements, display material deliveries, and storage of show goods. Close coordination between the local committee and the Headquarters Staff is the key to smooth administration of this function.

The Headquarters Staff is responsible for drafting a meeting announcement for distribution to potential exhibitors. The draft is sent in mid-March to the Conference Chair, who must comment and reply by mid-May. The Conference Chair should provide the Headquarters Staff with a list, including complete addresses, of any local or regional archaeological societies, publishers, or other organizations that may wish to display materials at the conference. By 30 September the Headquarters Staff distributes the announcement to local, regional, and national presses and other concerns inviting these organizations to supply materials for display at the meeting.

Traditionally, display copies and all extra books provided by various publishers are donated to the host institution(s). The local Conference Chair is the final arbitrator in the disposition of display copies, which are equitably distributed among the local key hosts. (QUESTION: Does this still occur? All vendors seem to attend and take responsibility for their materials.)

The Local Arrangements Chair, Conference Coordinator, and Headquarters Staff also should establish table fees for exhibitors. The recent trend in table fees at conferences is to bring those charges more in line with table fees charged by groups of comparable size and attendance to the SHA.
The Program Chair and Headquarters Staff must work together if a poster session is proposed, accepted, and scheduled for display in the Exhibits Center. Such planning should be carried out as early as possible in the period from mid-July to mid-December before the meeting. A larger space is needed if the poster sessions are included in the Exhibits Center.

**Space and Setup Requirement**

Although space and setup requirements were outlined in Section III, they will be briefly reiterated here. The Exhibit Center requires a room or large breakout that is characterized by the following:

- 4,000 square foot minimum floor space
- Access that may be restricted to one entrance/exit
- Entries that may be locked after hours

Setup will include:

- 40 standard skirted tables (2 x 8 ft.) arranged around the perimeter and in center rows
- 15 or more chairs for vendor and staff use
- Bulletin board with easel
- 6 cork pin boards (ca. 18 x 24 in.) with easels
- 4 waste receptacles (ca. 10–15 gal.)
- Electrical outlets or supplies for display apparatus and office equipment
- Telephone or radios

The Local Arrangements Chair and Headquarters Staff should expect some last minute changes at the meeting. Despite preplanning, the unexpected arrival of display material or exhibits is guaranteed, and the hotel should be made aware that as many as 24 additional tables may be required, depending on the amount of material received. These additional tables need to be on standby from Thursday morning through Friday noon.

**Staffing**

The facility is supervised and operated during the meeting by the Headquarters Staff who works closely with the Local Arrangements Chair and staff. Prior to the meeting, the Headquarters Staff arranges for acquisition and shipment of display materials, primarily publications, to the venue. The Local Arrangements Chair normally is responsible for receiving, storing, and transporting such shipments to the conference facility. Hotels, as a rule, will not receive or store SHA exhibit materials. The local committee also oversees the return shipment of some materials. The Local Arrangements Chair and staff assist the Headquarters Staff with set up and dismantling of book displays and, occasionally, other show material.

**Hours**

Operation hours of the Exhibit Center normally are as follows:

- Setup—Wednesday, 8:00 AM — until done; not open to conferees
• Thursday, 8:00 AM–5:00 PM
• Friday, 8:00 AM–ca. 4:30 PM (the center traditionally closes about 15 minutes before the beginning of the society’s Business Meeting)
• Saturday 8:00 AM–1:00 PM (later if a Public Education Session is scheduled Saturday afternoon.
• Breakdown—Saturday, from 1 PM to 3 PM, conferees allowed until closing. If the Public Education Session is located nearby and a halfway break is scheduled, the Exhibits Center should remain open until after the break.

Internal Procedures

The following provides a list of common practices and procedures related to operation of the Exhibits Center:

• Publications display and sales
  ◊ Display material (Do vendors really do this?)
    ▶ Unpacked and labeled “Display Copy”
    ▶ Placed on table(s) with order forms
    ▶ Exhibits overseen, but not individually attended during meeting
    ▶ Materials repacked at end of meeting and transferred to local host
  ◊ Publications sales
    ▶ Individuals or organizations may sell publications at the conference
    ▶ Sales are the responsibility of the seller
    ▶ Exhibitors selling publications must set up and staff their displays
    ▶ Exhibits Center staff will not handle sales.
• Reserved space
  ◊ SHA membership service desk, 4 tables
  ◊ Future meeting venues, 2 tables
  ◊ Graduate programs in historical archaeology and allied fields, 1 table
  ◊ Upcoming field schools, 1 table
  ◊ Sibling organizations, 1 table each (allocate-up to 4).

Trade Shows

Meeting organizers occasionally consider planning a trade show in conjunction with the conference. Trade Shows are formal exhibitions wherein commercial exhibitors display goods, services, equipment, and other wares for the benefit of conferees. Cost and management of such affairs are significantly different from standard meeting functions. Such exhibitions, if contemplated, must be organized independently of and separated physically from the conference Exhibits Center. Meeting organizers should consult with the Conference Coordinator about the benefits, expenses, and administration associated with these exhibitions.
VIII. CONFERENCE REPORTS

INTRODUCTION

Conference reports are essential to meeting planning and administration. They are the media by which the Site Committee documents its plans, progress, and management of the annual meeting for the membership and the board.

The Conference Chair prepares or oversees compilation of a series of brief status reports prior to the event and a detailed conference report shortly following the annual meeting. These reports serve multiple purposes:

- Communicating invitations and meeting information to the membership
- Informing the Board about conference planning progress
- Describing venue-specific program and social arrangements
- Ensuring compliance with conference structure and scheduling
- Defining existing or potential problems
- Commenting on innovative approaches or problem solutions
- Offering suggestions and recommendations on meeting organization, administration, policies, or procedures
- Providing accurate, detailed numerical data on all meeting aspects
- Serving as baseline information for future conference planning

The content of status and conference summary reports is discussed below.

STATUS REPORTS

Status reports are brief summations describing current meeting planning. Such reports will be required in the years following acceptance of a conference venue by the board. Site status reports are submitted to the Conference Coordinator for inclusion in the annual and mid-year Conference Committee report to the board and usually are drafted by the Conference Chairs.

Using the proposal as the initial guide, these reports should comment on refinements to and modifications of conference plans related to, as examples, committee structure, finances, conference facilities, program development, and social events. Although status reports tend to grow more complex and lengthy as the date of the meeting approaches, clarity and brevity are appreciated.

A year before the planned meeting a detailed progress report is expected. This report is designed to ensure that all conference program and administrative aspects are reviewed and critical schedules for the upcoming year are well understood. Pertinent sections of this manual should be scrutinized to address each of the following topics:
• Administrative functions and services
• Conference facility
• Financial status and plans
• Meeting chairs and staff
• Program plans
• Social event plans

Conference Chairs may elect or, occasionally, may be requested to provide an oral summary of their written status reports to the Board. In such instances, a meeting chair should be prepared to succinctly comment on and answer questions about the conference.

Finally, Conference Chairs should plan to address the membership at the annual Business Meeting. In the years before a scheduled conference, open invitations, brief descriptions of venue attractions, and comments on planned events should be designed to generate member interest, enthusiasm, and attendance. At the Business Meeting of the hosted conference, the Conference Chair should comment on attendance, the number of papers scheduled, and other relevant information.

CONFERENCE SUMMARY REPORT

The Conference Summary Report is compiled as the final account of a conference. The purpose of the report is to document the conference program and its administration. The report is designed to serve as a historical account of the society’s annual function and as a planning aid for future meetings. The importance of providing accurate, timely information—particularly numerical/statistical data—cannot be over emphasized. All required copies of the final report should be submitted to the Conference Coordinator no later than 30 June following the conference.

The 1991 Richmond conference staff developed and the 1992 Jamaica committee refined what has become the standard for such reports. The standard Conference Summary Report contains a narrative section summarizing conference information and appendices of supporting materials. All narrative must be supported by tabular data that can easily be provided to future conference planners -See Appendix D for a proper format.

The summary narrative must address the programmatic, administrative, and financial aspects of the meeting. Topics to be reported include, but are not limited to, the following:

• Administrative functions and services
• Advance and on-site registration
• Finances
• Local arrangements
• Program and sessions
• Site Committee
• Sponsorship and support
• Tours and social events
Appendices of supporting materials will include, but are not limited to, the following:

- A list of registrants
- Grant correspondence
- Conference expense documentation
  - Hotel group master bill
  - Hotel direct bill
  - Committee expenditures
- Announcements and call for papers
- Registration packet materials
- Final program
- News releases and articles

Authorship of the Conference Summary Report narrative section is a matter for the Conference Chair, in consultation with the meeting staff, to decide. The Richmond report was effectively compiled through the work of most of the chairs and coordinators who contributed sections to the final report. The Jamaica and Atlanta reports were written and compiled by the meeting chair. No matter who contributes to the report, treatment of each topic would benefit by uniformly commenting on the following:

- Description of task or event
- Staff and volunteers
- Duties and responsibilities of staff (if at variance with or undefined in this manual)
- Results
- Problems encountered
- Comments received
- Recommendations

The summary report is produced in two formats. Twenty (20) copies of the narrative or summary only and three (3) master volumes, which includes the narrative and document appendices. Distribution of the reports will be arranged with the Conference Coordinator. Narrative summaries will be submitted to the board. Two master copies will be required for the use by the Conference Coordinator, one as a working, reference copy and the second as a circulating issue for future meeting organizers. The third master summary report will be submitted to the Secretary-Treasurer as an archival document, along with clean copies of the conference registration packet materials and program.
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