



# **CONFERENCE MANUAL**

February 2006  
Revision October 2006  
Revision June 2012

## PREFACE

This document is the sixth revision of The Society for Historical Archaeology's *Conference Manual*. This manual will be in effect immediately upon approval by the SHA Board. It is anticipated that the 2014 meeting in Québec City will be the first to use this 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. This most recent revision of the manual was done by Della Scott-Ireton. Most appreciated are the pioneering efforts of these individuals in developing and standardizing conference procedures. Much of this information, however, now resides on the SHA website.

In its early days, the SHA turned over organization of 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), 2006 (Sacramento), and 2007 (Williamsburg) were subsequently planned and carried out in the absence of an up-to-date *Conference Manual*. In 2006, a revised *Manual* that reflected the organization and procedures developed since 2003, and that was based on lessons learned during the transition from an entirely volunteer-based to a professionally assisted conference process was created to guide local Site Committees. The 2006 revision was done by Patrick H. Garrow. In 2010 (Amelia Island, Florida) SHA implemented an on-line abstract submission and registration program called ConfTool. This version of the *Conference Manual* is intended to guide Site Committees using ConfTool and to provide a model for organization of current SHA conferences.

This *Manual* is organized in two formats. The outline schedule is organized as monthly and daily instructions for conference Site Committees to provide at-a-glance guidance and reminders. The on-line document contains much background information and detail and will serve to illustrate and describe the tasks listed on the outline schedule. We hope this format will prevent Site Committees from feeling overwhelmed by an overabundance of information and will result in a useful and user-friendly *Manual*.

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 of Directors policy.

Patrick H. Garrow, 2012

**TABLE OF CONTENTS**

**PREFACE..... II**

**TABLE OF CONTENTS .....III**

**LIST OF TABLES..... VIII**

**I. INTRODUCTION..... 1**

**PURPOSE AND ORGANIZATION ..... 1**

**SIGNIFICANCE OF THE ANNUAL MEETING ..... 1**

**ORGANIZATIONAL OVERVIEW ..... 2**

    General Responsibilities ..... 2

    Conference Committee ..... 2

    Site Committee..... 3

    Conference Staff ..... 4

**LEGAL AND FINANCIAL RELATIONSHIPS ..... 11**

**HISTORICAL TRENDS..... 11**

    Membership Figures ..... 17

    Demographics and Meeting Attendance ..... 17

    Conference Events and Activities ..... 17

    Conference Format..... 18

**GENERAL PLANNING OVERVIEW..... 21**

**II. THE PROPOSAL ..... 22**

**INTRODUCTION..... 22**

**PURPOSE ..... 22**

**FEASIBILITY..... 22**

    Site Committee..... 23

    Venue Survey ..... 23

**PREPARATION AND SUBMISSION ..... 26**

    Preparation ..... 26

    Submission..... 26

<b>EVALUATION AND SELECTION .....</b>	<b>27</b>
Evaluation .....	27
Selection.....	27
<b>III. THE HOTEL .....</b>	<b>29</b>
<b>INTRODUCTION.....</b>	<b>29</b>
<b>CONFERENCE FACILITY .....</b>	<b>29</b>
Introduction.....	29
Location and Amenities .....	29
Guest Room Accommodations .....	30
Space and Function Criteria.....	31
<b>NEGOTIATIONS .....</b>	<b>38</b>
Introduction.....	38
Individuals Responsible .....	39
Selection and Negotiation Process.....	39
<b>Hotel Proposals.....</b>	<b>40</b>
Room Block .....	40
Complimentary (COMP) Rooms .....	41
Room Rates.....	42
Meeting Function Space .....	43
Miscellaneous Services.....	43
<b>IV. FINANCES.....</b>	<b>45</b>
<b>INTRODUCTION.....</b>	<b>45</b>
<b>THE BUDGET AS A PLANNING TOOL .....</b>	<b>45</b>
<b>Income Resources.....</b>	<b>45</b>
Institutional Support.....	45
Registration Fees.....	46
Miscellaneous Revenues.....	48
Grants .....	48
Donations .....	49
Volunteers .....	49
Exhibits Center/Bookroom Fees.....	50
<b>ANTICIPATED EXPENDITURES .....</b>	<b>50</b>
Printing.....	50
Web Hosting .....	50
Social Media .....	51
Lodging .....	51
Fee Waivers .....	51

Award-Related Costs .....	51
Telephone and Other Electronic Communication.....	57
Hotel Charges.....	57
Miscellaneous Supplies.....	58
Entertainment.....	58
Tours .....	58
Audiovisual Equipment Rental.....	58
Commemorative Sales Items .....	59
The Unexpected .....	59
SHA Revenue.....	59
<b>BANK ACCOUNTS and Financial Reporting to the SHA.....</b>	<b>60</b>
<b>Registration Software .....</b>	<b>60</b>
<b>INSURANCE.....</b>	<b>60</b>
<b>V. THE PROGRAM.....</b>	<b>61</b>
<b>INTRODUCTION.....</b>	<b>61</b>
<b>ANNOUNCEMENTS .....</b>	<b>61</b>
<b>CALL FOR PAPERS .....</b>	<b>62</b>
Presentation and Submission Requirements .....	62
Organizational Guidelines .....	63
Preparing the Call for Papers .....	65
Receipt of Submissions.....	66
<b>Evaluating Submissions.....</b>	<b>67</b>
<b>ARRANGING SESSIONS .....</b>	<b>67</b>
Session Organizational Guidelines .....	67
Session Setup Reminders.....	70
<b>PLANNING SOCIAL, ADMINISTRATIVE, AND SERVICE FUNCTIONS.....</b>	<b>71</b>
Social Events.....	71
Planning and Scheduling Administrative Functions and Services .....	76
<b>DEADLINES .....</b>	<b>76</b>
<b>VI. REGISTRATION.....</b>	<b>78</b>
<b>INTRODUCTION.....</b>	<b>78</b>
Preregistration as Marketing .....	78
Electronic Registration.....	78
On-Site Registration.....	79

<b>ESTABLISHING A SCHEDULE .....</b>	<b>79</b>
Abstract Submittals .....	79
Publishing the Preliminary Program and Conference Registration Information .....	79
Preregistration and Refund Requests .....	80
Designing the Registration Form .....	80
<b>PROCESSING REGISTRATIONS BEFORE THE CONFERENCE .....</b>	<b>80</b>
<b>DESIGNING AND PRODUCING THE REGISTRATION PACKETS .....</b>	<b>81</b>
Nametags.....	82
Assembling Packets for Preregistrants.....	82
Assembling Packets for On-Site Registration.....	82
<b>REGISTRATION AT THE CONFERENCE .....</b>	<b>82</b>
Preregistrants.....	83
On-Site Registration.....	84
Registration and Other Fees - A Reminder.....	84
Caveat .....	84
 <b>VII. ADMINISTRATIVE AND SERVICE FUNCTIONS .....</b>	 <b>85</b>
<b>INTRODUCTION.....</b>	<b>85</b>
<b>ADMINISTRATIVE FUNCTIONS .....</b>	<b>85</b>
Annual Business Meeting .....	85
Awards and Prize Presentations.....	86
Board and Committee Meetings .....	87
Workshops and Caucuses .....	88
<b>SERVICE FUNCTIONS .....</b>	<b>89</b>
Administrative Functions.....	89
<b>Session Services .....</b>	<b>89</b>
Poster Sessions.....	89
Speaker Ready Room.....	90
Audiovisual Equipment .....	90
<b>General Services.....</b>	<b>91</b>
Childcare.....	91
Employment Center .....	91
Exhibits Center and Bookroom.....	92
Trade Shows.....	95
 <b>VIII. CONFERENCE REPORTS.....</b>	 <b>96</b>
<b>INTRODUCTION.....</b>	<b>96</b>

**STATUS REPORTS ..... 96**

**CONFERENCE SUMMARY REPORT..... 97**

**APPENDIX A: SHA CONFERENCE PLANNING SCHEDULE BY MONTH..... 99**

**APPENDIX B: SHA CONFERENCE PLANNING SCHEDULE BY DAY ..... 103**

**APPENDIX C: SHA CONFERENCE NEEDS FOR INCLUSION IN HOTEL CONTRACT ..... 110**

**APPENDIX D: LIVING IN CONFTOOL LAND - THE CONFTOOL MANUAL..... 112**

## LIST OF TABLES

TABLE 1. SITE COMMITTEE STAFF.....	5
TABLE 2. SHA CONFERENCE LIAISON STAFF.....	9
TABLE 3. PAST 5 YEARS' CONFERENCE INFORMATION .....	13
TABLE 4. REGISTRATION RATE FORMULAS .....	47
TABLE 5. EXAMPLE OF REGISTRATION RATES.....	46
TABLE 6. COSTS ASSOCIATED WITH SHA AWARDS AND PRIZES .....	51

# 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. The fifth revision of the *Conference Manual*, done by Patrick H. Garrow in 2006, 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. This latest revision, undertaken in 2011 by 2010 Conference Chair Della Scott-Ireton, reflects further refinements in conference organization and the implementation of an on-line abstract submission and registration program, ConfTool.

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 on 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 Québec City (1998–2000), the average rose to \$15,097. Conference revenue declined after 2000, and several conferences even posted financial losses. The most recent conferences yielded significant revenue for the Society. A major goal of this *Conference Manual* is to ensure that future conferences avoid losses and continue to make positive contributions 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. The 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 Local or 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 Society Executive Director, Treasurer, Workshop Coordinator, 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 Site Committee 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 Site Committee 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(s), 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, Terrestrial and Underwater Program Chairs, and Volunteer Chair. Additional personnel are added to the committee as planning progresses and depend upon the needs of each conference; not all positions may be needed. Other important conference staff positions may include, for example: Audiovisual Director, Public Program Director, Public Relations Coordinator, Accessibility & Inclusion Coordinator, Workshop Coordinator, Social Media Coordinator, Photographer, and Traditional Crafts Coordinator. The selection of the Underwater Program Chair will be made in consultation between the Conference Chair(s), Program Chair, and the ACUA Chair; the person selected should be an underwater archaeologist who is actively involved in underwater research and/or resource 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.

**TABLE 1. SITE COMMITTEE STAFF**

<i><b>POSITION</b></i>	<i><b>RESPONSIBILITIES</b></i>	<i><b>DUTIES</b></i>
<b>Conference Chair</b>	Directs site committee staff and coordinates primarily with the Conference Coordinator, the Headquarters Staff, the Awards Committee Chair, and other SHA officials as needed to run a successful meeting.	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.
<b>Local Arrangements Chair</b>	Responsible, under the general supervision of the Conference Chair, for organizing and implementing local events and social functions.	Principal duties: plans and recommends social events and tours; works with Headquarters Staff to ensure 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.
<b>Program Chair</b>	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. Responsible for updating conference app.	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; updates and maintains information for the conference app; 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.
<b>Volunteer Chair</b>	Responsible, under the general supervision of the Local Arrangements Chair, for recruiting and managing volunteers to aid with pre-conference tasks and meeting activities.	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 Director is responsible for verifying their student status and for recording their volunteer hours so that the appropriate registration fees, if any, apply.
<b>Terrestrial Program Chair</b>	Responsible, under the general supervision of the Program Chair, for organizing or overseeing and implementing terrestrial plenary, symposia, and contributed paper	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

	sessions, and events.	abstracts; and prepares a report summarizing all aspects of the terrestrial program.
<b>Underwater Program Chair</b>	Responsible, under the general supervision of the Program Chair, for organizing or overseeing and implementing underwater plenary, symposia, contributed paper sessions, and events.	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; provides an update on the underwater program to the ACUA Chair at the Tuesday ACUA Board meeting; serves on the ACUA/SHA Photo Competition judging committee; and prepares a report summarizing all aspects of the underwater program. Also serves as Editor of the Underwater Proceedings produced by the ACUA.
<b>Public Program Director</b>	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	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 or designated liaison to follow SHA policies.
<b>Finance Director</b>	Responsible, under the general supervision of the Conference Chair, for developing a detailed conference budget.	Principal duties include: develops, in coordination with the Conference Chair and the SHA Treasurer, a detailed conference budget; coordinates with other Site Committee staff to provide budget information for planning purposes; reports to Conference Chair on budget issues and needs; and prepares or compiles a report summarizing all aspects of the conference finances.
<b>Sponsorship Coordinator</b>	Responsible, under general supervision of the Conference Chair, for soliciting and collecting conference sponsors. May be combined with Finance Director.	Principal duties include: soliciting and securing sponsors for conference needs, including direct funds donations and in-kind donations; ensuring sponsors' requests are met; securing sponsor logos and distributing for printing in conference materials/display at the conference.
<b>Audiovisual Director</b>	Responsible, under the supervision of the Local Arrangements Chair, for organizing and arranging use of presentation equipment.	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.
<b>Public Relations Coordinator</b>	Responsible, under general supervision of the Conference Chair, for public relations related to the annual meeting.	Principal duties include: prepares news releases; coordinates with Awards Committee Chair on press releases for SHA awardees; and arranges for coverage by local, regional, and, occasionally, national print and electronic media.

<p><b>Tour and Events Director</b></p>	<p>Responsible, under the general supervision of the Local Arrangements Chair, for booking and handling tour logistics and other events as assigned.</p>	<p>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.</p>
<p><b>Accessibility &amp; Inclusion Coordinator</b></p>	<p>Responsible, under the general supervision of the Program Chair, for ensuring accessibility and inclusiveness of conference venues and functions.</p>	<p>Principal duties include: coordinating with Conference Chair and Program Chair to ensure any special accessibility requirements by SHA members/attendees are met; the needs of those belonging to marginalized communities are considered and accommodated; producing for the conference program an access package for those attending, to include, for example, travel information, targeted medical/spiritual/LGBTQ+ resources, and resources for disabled, parents, caregivers.</p>
<p><b>Continuing Education Workshop Coordinator</b></p>	<p>Responsible, under general supervision of the Program Chair, for coordinating with the Local Arrangements Chair and the Conference Chair to ensure that the SHA Continuing Education Workshops are logistically handled.</p>	<p>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 Program Chair and Headquarters Staff for appropriate space and audiovisual needs; coordinates with the Registration Chair to ensure that all SHA-sponsored workshop enrollment forms are received in the SHA Headquarters; consults with the local arrangements committee, as appropriate, when local venue offers special workshop opportunities.</p>
<p><b>Social Media Coordinator</b></p>	<p>Responsible, under general supervision of the Conference Chair, for establishing and maintaining social media resources for the conference.</p>	<p>Principal duties include: coordinating with SHA Social Media Coordinator; creating social media resources for the conference; in coordination with the Conference Chair; producing instructions for membership to access these resources; coordinating closely with the Public Relations Coordinator to promote the conference; maintaining resources by providing information updates, announcements, links, etc.</p>
<p><b>Traditional Crafts Director</b></p>	<p>Responsible, under the general supervision of the Local Arrangements Chair, for booking the traditional craftspersons for the conference.</p>	<p>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.</p>
<p><b>Photographer</b></p>	<p>Responsible, under the supervision of the Conference Chair, for taking photographs of conference events. Coordinates with History Committee Chair to turn over images for archiving.</p>	<p>Principal duties include: taking photos of conference events. These include photos of persons receiving their awards from the SHA President at the various awards presentation events, 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 Site Committee, and candid shots recording receptions, banquets, and other events. Photos are provided to the <i>SHA Newsletter</i> Editor</p>

		for publication and to provide a record of the conference for future reference. Awards photos are provided to the Awards Committee Chair for publicity and publication purposes. All photos are to be forwarded to the SHA History Committee Chair for archiving.
--	--	---

**TABLE 2. SHA CONFERENCE LIAISON STAFF**

<i><b>POSITION</b></i>	<i><b>RESPONSIBILITIES</b></i>	<i><b>DUTIES</b></i>
<b>Conference Coordinator</b>	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, the Conference Chair, and the Awards Committee Chair.	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.
<b>Headquarters Staff</b>	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, the Conference Chair, and the Awards Committee Chair.	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; serves as 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 <i>SHA Newsletter</i> ; 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 Site Committee and volunteers; coordinates space for conference workshops; responsible for production of all conference awards; coordinates with conference exhibitors for rental of table and booth space; serves as lead contact with conference hotel staff; coordinates with Awards Committee Chair on production of awards and on disbursement of benefits to awardees and other award details.
<b>Awards Committee Chair</b>	Responsible, under the general supervision of the Board of Directors, for administering and implementing the SHA’s awards program. Coordinates with Headquarters Staff, the Board, the President, the Treasurer, the Conference Coordinator, the Conference Chair, <i>SHA Newsletter</i> Editor, and the Journal Editor	Principal duties include: coordinates/oversees selection of awardees; notifies recipients; oversees publicity relating to awards; coordinates awardee(s) travel, lodging, and conference benefit arrangements and payment/reimbursement with Headquarters Staff and Conference Chair (or designee); coordinates with Conference Chair (or designee) and presenters to arrange conference awards presentations; prepares awards- and prize-related text for conference program; provides/coordinates text for presidential letters to awardees to provide to President and Headquarters Staff; prepares text for awards banquet program; coordinates/prepares copy for <i>SHA Newsletter</i> on awardees and prize winners
<b>Employment</b>	Responsible, in coordination with the	Principal duties include: prepares and coordinates employment information for use at the

<b>Coordinator</b>	Conference Chair, for planning and operating the conference Employment Center.	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.
--------------------	--	--

## 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 5 Years' Conference Information, summarizes conference information from the preceding five years. 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 Site Committee chairs, dates of important milestones, the fees charged, and the income, expenses, and net amount turned over to the SHA.

From 1990, conference dates, location, and theme:

Jan 9-14, 1990	Tucson, Arizona
Jan 9-13, 1991	Richmond, Virginia World System/World Views
Jan 8-12, 1992	Kingston, Jamaica 500 Years of Change: Contact and Consequences of Interaction
Jan 6-10, 1993	Kansas City, Missouri Transportation, Industrialism, & the 19 <sup>th</sup> -Century West
Jan 5-9, 1994	Vancouver, British Columbia, Canada Current and Future Applications of Science and Technology in Historical and Underwater Archaeology
Jan 4-8, 1995	Washington, DC Archaeological Perspectives on American Past
Jan 2-6, 1996	Cincinnati, Ohio

Bridging Distances: Recent Approaches to Immigration, Migration, and Ethnic Identity, and Forging Partnerships in Outreach and Education

- Jan 8-12, 1997      Corpus Christi, Texas  
Seaports, Ships, and Central Places
- Jan 7-11, 1998      Atlanta, Georgia  
The American Civil War & the Post-Bellum Nation
- Jan 6-10, 1999      Salt Lake City, Utah  
Crossroads of the West: 19<sup>th</sup>-Century Transportation, Mining, and Commercial Development in the Intermountain West
- Jan 4-9, 2000      Québec City, Québec, Canada  
Waterways and Landscapes
- Jan 9-13, 2001      Long Beach, California  
Teach the Mind, Touch the Spirit
- Jan 8-12, 2002      Mobile, Alabama  
Colonial Origins
- Jan 14-19, 2003      Providence, Rhode Island  
Trade and Industrialization
- Jan 7-11, 2004      St. Louis, Missouri  
Lewis and Clark: Legacy and Consequences
- Jan 5-10, 2005      York, England, United Kingdom  
Continuity and Change
- Jan 11-15, 2006      Sacramento, California  
Life on the Edge
- Jan 10-14, 2007      Williamsburg, Virginia  
Old World/New World: Culture in Transformation
- Jan 8-13, 2008      Albuquerque, New Mexico  
The Public Benefit of Historical Archaeology
- Jan 7-11, 2009      Toronto, Ontario, Canada  
The Ties that Divide: Trade, Conflict, & Borders
- Jan 6-9, 2010      Amelia Island, Florida  
Coastal Connections: Integrating Terrestrial & Underwater Archaeology
- Jan 5-9, 2011      Austin, Texas  
Boundaries and Crossroads in Action: Global Perspectives in Historical Archaeology

Jan 4-8, 2012	Baltimore, Maryland By the Dawn's Early Light: Forging Identity, Securing Freedom, and Overcoming Conflict
Jan 9-12, 2013	Leicester, England, United Kingdom Globalization, Immigration, Transformation
Jan 8-11, 2014	Québec City, Québec, Canada Questions that Count
Jan 7-10, 2015	Seattle, Washington Peripheries and Boundaries
Jan 6-9, 2016	Washington, DC A Call to Action: The Past and Future of Historical Archaeology
Jan 4-8, 2017	Fort Worth, TX Advancing Frontiers: Where the Next 50 Years of SHA Begins
Jan 3-6, 2018	New Orleans, LA Landscapes, Entrepôts, and Global Currents
Jan 9-12, 2019	St Charles, MO Making the Most of Opportunities: Education, Training, and Experiential Learning
Jan 8-11, 2020	Boston, MA Revolution

**TABLE 3. PAST 5 YEARS' CONFERENCE INFORMATION**

<b>Date</b>	<b>Location</b>	<b>Theme</b>	<b>Registration</b>	<b>Papers/ Sessions</b>	<b>Site Committee Chairs</b>	<b>Important Milestones</b>	<b>Rates</b> (USD without tax unless otherwise noted)	<b>Income/ Expenses</b>
2013 1/9- 1/12	Leicester, UK	Globalization, Immigration, Transformation	Total= 757 Members= 276 Non-Members= 116 Student Members= 115 Non-Member Student= 47 Guest= 34 1-day total: 16 Cancel/No Shows= 40 Exhibitor -Comp= 16 Exhibitor booth Staff= 8 Comp= 37 Volunteer= 77 Staff= 4	Abstracts: 600 Sessions: 83	Co-Chairs: Audrey Horning, Sarah Tarlow Program Chair: Alasdair Brooks		Registration (Early/Regular): SHA Member= \$180/205 Non-Member= \$280/305 SHA Student Member= \$85/120 Student Non-Member= \$140/165 Guest= \$50/75 Events: varied Banquet= \$50 Reception= \$40 Roundtable Lunches= \$25 Pre-Conference Workshops= \$Assort Tours= \$Assort Hotel Rates: (in UK pounds) Single/Double= £70/80	Income: \$159,649.90 Expenses: \$180,350.24 Total Profit: \$20,700.34
2014 1/8- 1/11	Québec City, Québec, Canada	Questions that Count	Total= 1048 Members= Non-Members= Student Members= Non-Member Student= Guest= 1-day Member= 1-day Non- Member= 1-day Member Student= 1-day Non-Member Student= 1-day Guest= Cancel/No Shows= Exhibitor -Comp= Exhibitor booth Staff= Comp= Volunteer= Staff=	Abstracts: 856 Sessions:	Chair: William Moss Program Chair: Allison Bain		(in Canadian dollars) Registration (Early/Regular): SHA Member= \$200/230 Non-Member= \$310/340 SHA Student Member= \$100/135 Student Non-Member= \$150/185 Guest= \$50/75 Events: varied Banquet= \$55 Reception= \$45 Roundtable Lunches= \$30 Pre-Conference Workshops= \$Assort Tours= \$Assort Hotel Rates: Single/Double= \$129	Income: \$299,384.52 Expenses: \$256,947.64 Total Profit: \$42,436.88
2015 1/7-	Seattle, WA	Peripheries and Boundaries	Total= 949 Members= 439	Abstracts: 536	Co-Chairs: Mark Warner, Robyn		Registration (Early/Regular): SHA Member= \$180/205	Income: \$222,759.75

1/10			Non-Members= 95 Student Members= 166 Non-Member Student= 78 Guest= 46 1-day total= 5 Cancel/No Shows= 6 Exhibitor -Comp= 19 Exhibitor booth Staff= 11 Comp= 21 Volunteer= 65 Staff= 4	Sessions: 82	Woodward Program Chair: Ross Jamieson		Non-Member= \$280/305 SHA Student Member= \$85/110 Student Non-Member= \$140/165 Guest= \$50/75 Events: varied Banquet= \$45 Reception= \$55 Roundtable Lunches= \$30 Pre-Conference Workshops= \$Assort Tours= \$Assort Hotel Rates: Single/Double= \$129	Expenses: \$156,386.19 Total Profit: \$66,373.56
2016 1/6- 1/9	Washington, DC	A Call to Action: The Past and Future of Historical Archaeology	Total= 1413 Members= 643 Non-Members= 183 Student Members= 218 Non-Member Student= 105 Guest= 50 1-day Member= 9 1-day Non-Member= 22 1-day Member Student= 0 1-day Non-Member Student= 0 1-day Guest= 0 Cancel/No Shows= 8 Exhibitor -Comp= 34 Exhibitor booth Staff= 24 Comp= 49 Volunteer= 66 Staff= 5	Abstracts: 862 Sessions: 121	Co-Chairs: LouAnn Wurst, Michael Nassaney Program Co-Chairs: Julie Schablitsky, Lisa Kraus		Registration (Early/Regular): SHA Member= \$180/205 Non-Member= \$280/305 SHA Student Member= \$85/110 Student Non-Member= \$140/165 Guest= \$50/75 Events: varied Banquet= \$55 Reception= \$55 Roundtable Lunches= \$30 Pre-Conference Workshops= \$Assort Tours= \$Assort Hotel Rates: Single/Double= \$145	Income: \$341,259.92 Expenses: \$190,719.66 Total Profit: \$150,540.26
2017 1/4- 1/8	Ft Worth, TX	Advancing Frontiers: Where the Next 50 Years of SHA Begins	Total= 856 Members= 400 Non-Members= 105 Student Members= 157 Non-Member Student= 72 Guest= 19 1-day Member= 0 1-day Non-Member= 1 1-day Member	Abstracts: 628 Sessions: 77	Co-Chairs: Amy Borgens, Tiffany Osburn Program Chair: Todd Ahlman	50 <sup>th</sup> anniversary of SHA	Registration (Early/Regular): SHA Member= \$180/205 Non-Member= \$280/305 SHA Student Member= \$85/110 Student Non-Member= \$140/165 Guest= \$50/75 Events: varied Banquet= \$55 Reception= \$45 Roundtable Lunches= \$30 Pre-Conference Workshops= \$Assort Tours= \$Assort	Income: \$223,536.05 Expenses: \$166,222.95 Total Profit: \$57,313.10

			Student= 0 1-day Non-Member Student= 4 1-day Guest= 1 Cancel/No Shows= 21 Exhibitor -Comp= 21 Exhibitor booth Staff= 6 Comp= 29 Volunteer= 37 Staff= 4				Hotel Rates: Single/Double= \$139	
--	--	--	--	--	--	--	--------------------------------------	--

## **Membership Figures**

The Society's membership grew from 246 in late 1967 and has hovered around 2,000 for the last several years. The total membership is 1,769 as of December 2017, down from 2,201 in December 2011 and over 2,300 in the mid-1990s. Student members represent about 18% of the total membership.

## **Demographics and Meeting Attendance**

Historically, the Society's membership primarily is derived from the United States and Canada. Approximately 94% of total members (individual and institutional) are located in the United States and Canada. The remaining members come from South America (1.1%); the Caribbean (< 1%); Europe (2.6%); Australia and New Zealand (1.7%); and Africa, Asia, and the Middle East combined have less than 1%. Geographic distribution of the membership is further concentrated. Approximately 46% of total membership is located in the east coast states, with 17.3% in New England and the Mid-Atlantic, and 28.8% in the South Atlantic. A further 25.6% are in the Mountain and Pacific West states, and 14.7% are in the Midwest.

Meeting attendance tends to parallel the number and geographic distribution of Society members. Conference registrants ranged from 62 in 1967 to an all-time high of 1,608 in 2007 at the Williamsburg meeting. The 2016 meeting in Washington, DC, had 1,413 registrants, the second highest number of attendees of any conference. Conference location tends to influence actual participation in the Society's meeting. Conferences held in cities along the east coast of the U.S. generally have higher attendance (1,608 in Williamsburg; 1,103 in Amelia Island; 1,413 in Washington DC), although meetings in the west and midwest are becoming more well-attended (1,046 in Albuquerque; 1,182 in Austin). Conferences held outside the U.S. (Ottawa in 1977, Kingston in 1992, Vancouver in 1994, Québec in 2000 and 2014, York in 2005, Toronto in 2009, and Leicester in 2013) had attendance of 512, 819, 612, 1,137 & 1,048, 987, 931, and 757, 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 and prizes is most often integrated with the plenary session, the banquet, and the Business Meeting. The Exhibits Center/Bookroom and various board, committee, and caucus meetings also are standard functions.

### *Papers and Sessions*

The number of scheduled conference papers averaged 377 between 1990 and 2006, and increased to an average of 726 between 2007 and 2011, and 696 between 2013 and 2017. The total number of sessions, including organized and contributed symposia, poster sessions, fora, and panels, is

consistently in the 80 to 100 range. 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 \$180 for preregistered members. Hotel rates have ranged from \$99 to \$145 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 hotels that are historic register properties or other similar amenities that are supported by the Society. Hotels can be encouraged to offer special conference rates for a few days before and/or after the conference as an incentive to attendees to lengthen their stay.

To encourage preregistration and membership in the SHA, since 1993 the rates for nonmembers and late registrants have been set substantially higher than for preregistered members. Refer to the discussion on conference fees, and Tables 4 and 5 in Chapter IV. From 2007 through 2011, preregistration ran about 75% of total attendees, ranging from 65.7-78.9%.

Event costs associated with the conference have remained relatively constant in recent years. The Awards Banquet usually costs about \$45 to \$55 per ticket. Roundtable lunches are in the \$25 to \$30 range. Tours have been offered at fees ranging from \$8 to \$75, depending on length of the tour, entry fees, transportation costs, and food service.

## **Conference Format**

### *Sessions*

Plenary, symposia, and contributed paper sessions form the basis of the meeting. Eight to 12 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 2005 York meeting had a Sunday session to accommodate a combination of a large number of symposia and limited meeting space. The 2017 Austin meeting had up to 15 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 Presidents' Student Reception* is usually held Thursday afternoon with light snacks and soft drinks provided. Alcoholic beverages are generally not included due to many students being under-age. This event is often held in an open room or lobby space and is free for student members of SHA.
- 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* may be 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. Alternatively, sponsor(s) may be found to fund this service.

Receptions normally are scheduled for Wednesday and Thursday evenings and optionally planned for Friday and Saturday evenings. These events may be held at or away from the conference facility and may 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 2 hours. This Friday meeting cannot conflict with the Business Meeting or the Banquet. The Friday 3:00 PM to 5:00 PM timeframe usually satisfies these requirements.
- Various committees of the Society and other groups meet annually at the conference. Scheduling of committee meetings is always problematic, due to scheduling conflicts of committee members and the tendency of individuals to serve on multiple committees. Several strategies have been tried and there are pros and cons of each. Committees may

meet in different rooms, or in a large room with separate tables for each committee. Meetings may be scheduled throughout the day, or all in the morning before symposia begin. Previous conference programs can be consulted for ideas.

- The Budget Committee traditionally meets on Friday over lunch, often in the Presidential Suite; lunch costs should be included in the conference budget, food is arranged by the Site Committee and is generally catered by the hotel.
- The Awards Committee Chair makes arrangements for the time and place of the Awards Committee meeting, as it must take place before Friday's business meeting and awards banquet. It should be listed as "TBA" in the conference program.

### *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 Managers 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 previous conference programs for some of the days and times allotted to these groups. Such non-programmatic 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 Wednesday (and possibly Tuesday).

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 Workshop Coordinator in consultation with the SHA Treasurer. The SHA Continuing Education Workshop 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 with the presentation of awards or prizes.

## **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 (see 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. Appendices A and B provide timelines for conference activities and associated deadlines. Frequent referral to Appendix A and Appendix B should be made so they can serve as reminders to ensure key deadlines are met.

The year before the conference has many critical deadlines that affect conference success. Program and registration information are critical for 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 arise 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 are 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.
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

Two preliminary and essential tasks must be completed before drafting a conference proposal:

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 in 1992, 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 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 is minimized. The 2010 conference was held at a resort, Amelia Island Plantation, with excellent results. 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-North America location at least every five years has been set by the current Conference Committee. The success of the Jamaica 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 websites 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 (January) and mid-year (usually June) 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:

- Personnel and institutional support
  - Site Committee organization
  - Host(s) and supporting institutions
  - Grants-in-aid
- Conference venue
  - Location
  - Transportation services
  - Hotel(s)
  - Amenities
- Program and administrative functions
  - Thematic conceptualization
  - Function/event planning and scheduling
- 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. At least one gender-neutral restroom is required.

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 Amelia Island conference hotel established a common 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. A block of about 400-450 rooms has been occupied by conferees on Thursday and Friday nights. Approximately 200-250 and 200-225 rooms were used on Wednesday and Saturday nights, respectively. Therefore, any hotel considered as a convention facility must have a block of about 450 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 United States, 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 Wednesday workshops and pre-conference tours.

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. Free WiFi in guest rooms as well as in hotel common areas (lobby, coffee shop, etc.) is extremely desirable. Other amenities may be present depending on the quality of the hotel.

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. See also Appendix B.

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 audiovisual 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 has become a standard part of 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 (PEIC) is responsible for assisting the Site Committee in planning this session. Each year, the PEIC assigns a committee member to be a liaison with the Site Committee; this person is responsible for assisting the Site Committee Public Program Director in planning and executing the Public Session.

Usually, the Public Session is planned to be of interest to both children and adults. Programs have included hands-on activities, lectures and presentations, videos, and other media. As a result, the space needed for the Public Session is dependent on the content of the program. At the 2010 Amelia Island conference, a near-by interpreted archaeological/historical attraction hosted the Public Event. It was well-attended by conferees and the public, although it required additional transportation arrangements. Further, this session is normally held on Saturday afternoon so the public can easily attend. Local avocational societies often are 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 may be obtained to help defray the cost of the Public Session.

### Meeting Rooms

Eight to 15 rooms or breakouts normally are required for concurrent paper sessions and symposia. Ideally, each room should comfortably seat 75-150 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 50-150 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 Continuing Education 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. Remote-controlled image advancers are encouraged. Laptop computers will not be supplied, and symposia organizers are required 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 are becoming a more popular way to communicate research results at SHA conferences. Posters are an efficient way to present information, and 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/Bookroom displays. A session with more than four presenters should be scheduled for a room near the Exhibits Center/Bookroom or a space convenient to the session rooms. Organizers should plan for a large session and identify space where 10-20 display panels may be arranged and viewed throughout the meeting.

The hotel may be able to provide the display panels (which should be included in the hotel contract), or they may have to be ordered from an outside supplier. Display panel rental fees should be included in the conference budget and conference organizers should remember to schedule drop-off and pick-up of the panels. Organizers should also coordinate with the ACUA as display panels also are needed for the ACUA/SHA Archaeological Photo Competition.

### 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 with microphones; 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. Due to the number of microphones, a sound mixing board and audio technician to run it usually are needed. 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. No functions or sessions should be held at the same time as the Business Meeting.

## Board and Committee Meetings

The SHA Board, the ACUA Board, 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 30 November, 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/or coffee service. Water service is provided without charge for scheduled meetings; coffee may be paid for by the committee chair if desired.

## 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 1 for additional information. Those groups should be scheduled 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. 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.

In 2011 (Austin), an additional feature was added to the Exhibits Center, called the Technology Room. Exhibitors presented technologically advanced equipment and techniques where attendees

could browse and ask questions of exhibitors. The Technology Room proved to be popular and conference organizers should coordinate with the SHA Technology Committee on future presentations.

### 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 a 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. A designated, secure internet connection is needed to process on-site registrations. The Headquarters Staff will 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 ACUA Board and the SHA Board who have preregistered should be delivered to their meeting area prior to the start of their Tuesday and Wednesday meetings.

### Conference Office

Space should be identified and reserved for use as a conference office. This office will function as the Headquarters Staff and Site 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. Most hotels include a provision in the hotel contract that sets the minimum amount of income that the hotel must receive from food and beverage sales in exchange for a reduced room rate and free meeting space. The annual banquet is normally held in the conference hotel to help meet that obligation. Further, since the annual awards ceremony is typically held after the meal is cleared, holding the banquet at the hotel allows 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 to be unfair to students and resulted in poor student attendance at the conference due to increased registration cost. 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.

A large-format LCD projector and attendant will be needed for the awards presentations, which could include as many as four of the top-tier awards, i.e., the J.C. Harrington Medal, the Carol C. Ruppé Award, the John L. Cotter Award, and the Daniel G. Roberts Award for Excellence in Public Historical Archaeology. 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 given 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 people 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. A restaurant within the hotel may be able to provide space as well. Roundtable luncheons may be scheduled on Thursday, Friday, or Saturday.

Similar setups for breakfast roundtables, starting around 7:00 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 their own cost for the Past Presidents' 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 opening 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 was long a tradition of the annual conference. In recent years, however, rising costs have precluded free coffee service unless an organization, agency, or individual offers to sponsor it. If free coffee service is not possible, the hotel usually can arrange a coffee cart to sell coffee, tea, and even breakfast items such as fruit and muffins. This service minimally is scheduled for the morning and afternoon breaks Thursday through Saturday. Coffee service is extremely expensive and must be closely monitored if offered to the attendees on a complimentary basis. 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. Coffee service, if not available immediately adjacent to the Exhibits Center/Bookroom, should be placed in the registration area for the use of both the attendees and the Exhibits Center/Bookroom 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.

### Other Catering Services Including Committee Meetings

The ACUA Board and the SHA Board require catering service during their Tuesday and Wednesday 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 Saturday meeting, 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 25 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 is required, excepting that noted above for the Exhibits Center/Bookroom 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. See Appendix C for a list of needs to be considered for a conference hotel contract.

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 \$500,000 (based on 1,000 attendees spending \$175 per day for lodging, food and drink for three days each) 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, do not 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 conference 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 C contains a variety of 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 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 **must** 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 (2015 Seattle, 2016 Washington DC, 2017 Ft Worth), actual room occupancy at the conference hotel (does not include overflow rooms at other hotels) has ranged as follows:

	<u>2015</u>	<u>2016</u>	<u>2017</u>
• Saturday	1	2	0
• Sunday	12	9	1
• Monday	44	61	33
• Tuesday	137	219	156
• Wednesday	306	448	393
• Thursday	332	477	426
• Friday	331	466	415
• Saturday	275	309	300

• Sunday	18	19	9
TOTAL	1456	2010	1733

The average occupancy per day at the conference hotel has been 44 for Monday, 197 for Tuesday, 427 for Wednesday, 456 for Thursday, 446 for Friday, 345 for Saturday, and 27 for Sunday. Organizers planning meetings, 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 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

Complimentary, or “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 night of free 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 1:30 and 1:40. 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: **(NOTE: The SHA Board has approved funding to cover the travel and accommodation expenses of each Board member at the SHA conference. Technically, therefore, they don’t actually need comp rooms, but if they receive a comp room, then there is less of an outlay for the SHA. This was an area of considerable misunderstanding at times as the Conference Committee freely gave away the comp rooms, exceeding the number received. Headquarters Staff and the Committee Chair need to explicitly coordinate on the issue of comp rooms and to whom they are allotted.)**

- SHA President (Parlor or Presidential Suite)
- ACUA Chair
- Conference organizers make reservations for up to 5 nights each for the 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); beginning in 2013, room costs for the recipient of the Daniel G. Roberts Award will be paid for from an award endowment.
- SHA Secretary-Treasurer

- Editor, *Historical Archaeology*
- Editor, *SHA Newsletter*
- Board Member, Senior
- Board Member, Senior
- Conference Coordinator
- Conference Chair
- Program Chair
- Local Arrangements Chair

Rooms for the Headquarters 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 \$145 per night for recent and near future meetings. It is important to negotiate room rates as low as feasible to encourage attendance. 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). That is not an acceptable offer. Most recently the Conference Committee and Board have negotiated firm, fixed room rates for conferences set well in the future, generally at least 5 years.

A minimum of 10% of the room block needs to be at the prevailing government per diem rate or less 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.

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. Obviously, this single-rate structure is preferred because it benefits students and entry-level individuals.

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 1996 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 Site Committee members, in addition to designated representatives of the Headquarters Staff, have 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 Staff. 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 audiovisual problem. In Amelia Island (2010), the Local Arrangements Chair, the Program Chair, the Conference Chair, and Headquarters Staff were provided with walkie-talkies to communicate with each other and with 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 unanticipated costs.

### **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 two times:

- 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.

† This category poses 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 registration 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**

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

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**

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

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 and shipping to the conference site). Fewer and fewer commemorative items have been offered in recent years since they tend to cost more than can be recovered through sales.

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 the advance sales funds that are in-hand to purchase commemorative items ensures that on-site sales will constitute pure profit and will make commemorative sales a no-lose situation.

Commemorative items with the SHA logo are generally popular. Arrangements for their sale and the return of proceeds to the SHA 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. Do not use pending grants to fund any function of the conference. If there is any question 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. The Conference Committee should establish a position of Conference Development Chair. 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 borrowed 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 and/or discounted or free services from corporations. In the past, cultural resources consulting firms have helped subsidize luncheon workshops, student attendance, receptions, and coffee breaks, and have designed and printed the Awards Banquet programs.
- 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 some donations are almost certain, 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 (8 hours) 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 Site Committee, and the Board to ensure 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 Site 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 Site Committee and the Headquarters Staff. Items that may require printing include:

- Program/Abstracts book
- At-a-Glance conference schedule
- Map of the conference venue
- 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
- Program for the Awards Banquet (donated in 2012, but in previous years prepared by the Site Committee)

#### **Web Hosting**

The Website Editor is responsible for maintaining the SHA website. The call for papers, announcement of preregistration, preliminary program, and final program are posted on the SHA website by the Website Editor. Site Committees are urged to work closely with the Website Editor to provide information that will help members plan their stay at the conference.

With the adoption of ConfTool as the mechanism for on-line abstract submission and conference registration, the registration process has been streamlined. Each year's Site Committee is responsible for familiarizing themselves with the ConfTool system. A manual for ConfTool use, including instructions and tutorials, is included in this *Manual* in Appendix D.

The Headquarters Staff is responsible for handling fees from the online conference registration. This includes fees for registration, Exhibit Center/Bookroom tables, tours, workshops, roundtables, and banquet. The Site Committee is not expected to handle any funds related to conference registration, but should work closely with Headquarters Staff to coordinate fee amounts and other details.

### **Social Media**

Since 2010, Site Committees have included a Social Media Liaison position to manage the social media presence on Facebook and Twitter for conferences. The Social Media Liaison should coordinate closely with the SHA Social Media Coordinator to ensure consistency of Society message and the process for effective social media for the conference.

### **Lodging**

Lodging is normally provided during the meeting so that key Site Committee 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, 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 6) provides the latest Board guidance adopted or confirmed at their January 2012 meeting. All estimated costs are based on 2012 fees and expenses.

**TABLE 6. COSTS ASSOCIATED WITH SHA AWARDS AND PRIZES**

<b>J. C. Harrington Medal</b>	Who Pays 2012 Conference	Conference 2013 & Later	Estimated 2012 Cost	Comments

<i>Awardee:</i>				
Travel from residence to conference hotel and return, including airfare (\$650), mileage at 25¢/mile, parking, and shuttle fees (\$100)	Awards	Awards	\$750	Must present receipts for reimbursement.
Lodging @ \$175/night for up to 5 nights	Awards	Awards	\$700	Extended to 4 nights to allow for entire length of conference.
Registration at the preregistration regular member rate	Awards	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Banquet ticket	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
Tours (optional)	Awards	Awards	\$75	\$75 cap, must present receipt for reimbursement.
Photo of Awardee for <i>Historical Archaeology</i>	Awards	Conference	\$75	\$75 cap, must present receipt for reimbursement.
Lifetime SHA Membership	Membership	Membership	reduced SHA revenue	Expense absorbed by membership budget (not offset by any revenue).
Wooden box for medal	Awards	Awards	\$200	
<i>Spouse:</i>				
		N/A		
Registration at the preregistration regular member rate	Awards	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Banquet ticket	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
<i>Presenter:</i>				
Registration at the preregistration regular member rate	Awards	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Banquet ticket	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
<b>TOTAL HARRINGTON AWARD COSTS</b>			Awards \$1,980	
			Conference \$540	
<b>Carol V. Ruppé Award</b>	not awarded in 2012			

Travel from residence to conference hotel and return, including airfare (\$650), mileage at 25¢/mile, parking, and shuttle fees (\$100)	Awards	Awards	\$750	Must present receipts for reimbursement.
Lodging @ \$175/night for up to 54 nights	Awards	Awards	\$700	Extended to 4 nights to allow for entire length of conference.
Registration at the preregistration regular member rate (awardee only)	Awards	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Banquet ticket (awardee only)	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
Photo of Awardee for <i>Historical Archaeology</i>	Awards	Awards	\$75	\$75 cap, must present receipt for reimbursement.
Engraved plaque in wooden frame	Awards	Awards	\$200	
<b>TOTAL RUPPÉ AWARD COSTS</b>			Awards \$1,785 Conference \$180	
<b>Daniel G. Roberts Award for Excellence in Public Historical Archaeology</b>	2012 is inaugural award; John Milner Associates endowed the award and covered all costs for 2012 outside of the conference or awards budget			Award costs will be similar to those for the Ruppé, and in 2013 and after will hopefully come from interest on endowment.
<b>John L. Cotter Award</b>				
Travel from residence to conference hotel and return, including airfare (\$650), mileage at 25¢/mile, parking, and shuttle fees (\$100)	Awards	Awards	\$750	Must present receipts for reimbursement.
Lodging @ \$175/night for up to 5 nights	Awards	Awards	\$700	Extended to 4 nights to allow for entire length of conference.
Registration at the preregistration regular member rate (awardee only)	Awards	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Banquet ticket (awardee only)	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
Photo of Awardee for <i>Historical Archaeology</i>	Awards	Awards	\$75	\$75 cap, must present receipt for reimbursement.

Certificate in wooden frame	Awards	Awards	\$225	Does not include the cost of the plate for the Cotter Award, which is already in stock.
<b>TOTAL COTTER AWARD COSTS</b>			Awards \$1,810 Conference \$180	

<b>James Deetz Book Award</b>				
Registration at the preregistration regular member rate (awardee only)	Conference	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Banquet ticket (awardee only)	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
Certificate in glass frame	Awards	Awards	\$75	
Cost of shipping books to panelists	Awards	Awards	\$200	This postage is often covered by a donor.
<b>TOTAL DEETZ AWARD COSTS</b>			Awards \$335 Conference \$180	

<b>Kathleen Kirk Gilmore Dissertation Award</b>	Used to be SHA Dissertation Prize up to 2011; 2012 will be inaugural presentation of Gilmore Award	Award proposed to be under Awards Committee "umbrella" starting in 2012 (post-Baltimore conference); EAC no longer involved in terms of funding		
Cash prize of \$1,000	Donor	Awards	\$1,000	Since ____, prize is the flat \$1,000 awarded at the conference. Awardee no longer required to publish with the SHA/UFPA and have an advance publication contract to get the full prize. Prize money has come from anonymous donor the last several years; but in 2013 Society funds should be allocated for this (even if some of the funding still continues to come from a donor).
Registration at the preregistration regular member rate (awardee only)	Awards	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).

Banquet ticket (awardee only)	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
Certificate with gold foil seal in certificate jacket	Awards	Awards	\$5	\$75 cap, must present receipt for reimbursement.
<b>TOTAL GILMORE AWARD COSTS</b>			Awards \$1,065 Conference \$180	

<b>Awards of Merit</b>	Two or three given each year -- cost here is for one awardee only			
Registration at the preregistration regular member rate (awardee only)	Conference	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Banquet ticket (awardee only)	Awards	Awards	\$60	Expense absorbed by conference budget (not offset by any revenue).
Certificate in wooden frame	Awards	Awards	\$75	
<b>TOTAL AWARD OF MERIT COST PER AWARDEE (AVERAGE)</b>			Awards \$335 Conference \$180	

<b>Student Paper Prize</b>	Should no longer allocate costs to APTC - prize proposed to be under Awards Committee "umbrella" starting in 2012 (post-Baltimore conference)			
Student membership, 1 year (a paper transaction)	Membership	Membership	\$80	Expense absorbed by membership budget (not offset by any revenue).
Donated books from book room vendors	N/A	N/A	?	Need to document procedure for soliciting and collecting these books so that Award Committee Chair can monitor as necessary, etc.
Registration at the preregistration regular member rate (awardee only)	Conference	Conference	\$180	Expense absorbed by conference budget (not offset by any revenue).
Shipping donated books to winner	Awards	Awards	\$125	Expense absorbed by conference budget (not offset by any revenue).
Certificate with gold foil seal in certificate jacket	Awards	Awards	\$5	

TOTAL STUDENT PAPER PRIZE COSTS			Awards \$210 Conference \$180	
---------------------------------	--	--	----------------------------------	--

<b>Jelks Travel Award</b>	Award proposed to be under Awards Committee "umbrella" starting in 2012 (post-Baltimore conference)	May be more than one awardee in a single year		
Funding for travel expenses (based on interest earned from Jelks Travel Fund)	Jelks Travel Fund	Jelks Travel Fund	\$500	Expense absorbed by Jelks Student Travel Fund.
<b>TOTAL JELKS AWARD COSTS</b>			<b>Jelks Fund \$500</b>	

<b>Québec City Award / Bourse de Québec</b>	Award proposed to be under Awards Committee "umbrella" starting in 2012 (post-Baltimore conference)			
Funding for travel expenses (based on interest earned from Québec Travel Fund)	Québec Travel Fund	Québec Travel Fund	\$600	Expense absorbed by Québec Travel Fund.
Certificate with gold foil seal in certificate jacket	Awards	Awards	\$5	
<b>TOTAL QCA/BDQ AWARD COSTS</b>			<b>Québec Travel Fund \$600 Awards \$5</b>	

<b>George R. Fischer International Student Travel Award</b>	Recipient chosen each year by ACUA; award funded and furnished by ACUA.			
Funding for travel expenses provided by the ACUA	ACUA	ACUA	\$1000	ACUA
Check to student provided by ACUA	ACUA	ACUA		
<b>TOTAL GRF STUDENT AWARD COSTS</b>			<b>\$1000</b>	

<b>Harriet Tubman Student Travel Award</b>	Recipients chosen each year by GMAC; award funded and furnished by GMAC.				
	Funding for travel expenses provided by the GMAC	GMAC	GMAC	\$1000 total – two \$500 awards	GMAC
	Check to student provided by GMAC	GMAC	GMAC		
	<b>TOTAL GMAC STUDENT AWARD COSTS</b>			\$1000	

SHA Headquarters Staff coordinates with the Awards Committee Chair to determine how many complimentary registrations are needed each year, based on which awards are being given. The Site Committee should coordinate with the Award Committee Chair to determine how many complimentary hotel rooms will be needed for awardees and for how many nights. 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, Cotter, and other award recipients indicating SHA reimbursable costs. A copy of the travel authorizations will be provided to the Site Committee. It is strongly suggested that the Conference Chair, Headquarters Staff, and the Awards Committee Chair coordinate closely with the SHA Treasurer to ensure the budget process, procedures, and award process are planned in accordance with the Society’s directives. This process must begin early in the year before the conference is 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, although email communication and Skype will greatly reduce this cost. These expenses generally maybe included within institutional support, but this should be clarified before the budget is prepared.

All Site Committee and Headquarters Staff should have a cell phone for ease of communication during the conference. Ensure numbers for crucial people are shared.

### **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 Board meeting

- 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 digital 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 lists of supplies and project their costs. Common supply items include pens, pencils, file folders, staplers, storage boxes, easels, 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 the dance. This is a free event open to all conference attendees. Entertainment expenses normally are paid from conference revenues. Besides normal fees, costs 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. Laser pointers should no longer be rented on a conference-to-conference basis, and will either be passed on from one conference to the next or purchased as 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 PowerPoint 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 PowerPoint 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 set up. 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. Per Board mandate, the current minimum expected revenue is \$7,500 (USD). That dollar amount is included as a line item in the Society's annual budget. Some 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 ensuring that each attendee has a positive experience.

## **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 Site 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 Site 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 Site 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 2012 for 2014), a general announcement of the meeting will be sent by the Conference Chair to the SHA *Newsletter* Editor for the Spring 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 conference* (e.g., December 2012 for 2014), brief notices such as the following example will be sent to the following publications: *AAA Anthropology News*, *NPS Common Ground*, *Current Anthropology*, *SAA Archaeological Record*, and *SPMA Newsletter*.

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, and contact information including name, address, telephone and

fax numbers of the Conference Chair, as well pertinent as email addresses and the conference Web and social media site addresses if 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. Endorsement of the Society's ethical position statement is required for submission of abstracts. The ethics statement should appear on the ConfTool registration page with a check box for acceptance, and on any hard-copy Abstract Submittal form along with a signature line. Any abstract submission not properly endorsed must be immediately returned.

#### *Abstract Submission Fees*

In the past, individuals wishing to make a presentation at the annual meeting were required to preregister for the conference when they submitted their abstracts. With the adoption of ConfTool in 2010 this requirement was ended, although it was reinstated in 2015. The abstract fee is intended to control the issue of people submitting abstracts with no intention of attending or presenting at the conference, simply to get their name in the program in order to fulfil a requirement of their employment. Bogus abstracts cause problems for the program committee in organizing and scheduling symposia.

Abstracts not received by the due date may not be included in the program. Alternatively, a \$25 late fee for abstracts received after the due date can be assessed. 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.

### *Registration Deadline*

All presenters must register to attend the conference by November 1, or their paper/session will be removed from the program.

### *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 for papers is either 15 or 20 minutes (decided by the Site Committee and depending on number of papers submitted, space available, and time available), and 10 minutes for reports. 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 multiple speakers, each allocated a 15- or 20-minute presentation. The session generally includes the participation of at least one discussant, who 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 Continuing Education Courses*

Various groups and individuals may offer, or be solicited to offer, short (half day or full day) courses on topics of interest to Society members. Some may be offered by nationally known training institutions, such as the University of Nevada-Reno, or by knowledgeable SHA members. The SHA Continuing Education Coordinator usually arranges these courses for presentation on Wednesday of the conference, and a fee usually is paid to the Society which is split with the workshop presenter(s). 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 workshop beverage and food service, if provided. This support of the SHA Continuing Education Coordinator is not a conference budget responsibility.

The SHA Continuing Education Coordinator is responsible for communicating early in the process the space requirements and audiovisual equipment needs of these workshops to the Conference Committee.

Other events, such as film or video presentations of archaeological projects, may be arranged for by the Program Chair. These may be presented in the evening or at other times when they do 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 Spring edition of the SHA *Newsletter* preceding the conference. The Call for Papers should also be posted on the SHA website at the same time. 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, deadlines, 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. Critical information will be highlighted.

The second part of the Call for Papers is an abstract form. This form must be simple, straightforward, and complete. The form must provide the following essential data:

- Conference name or identification, e.g., SHA 2011 Austin, TX
- 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 PowerPoint 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 (15 or 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. 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. Once identified, luncheon leaders should provide a short (two to three sentence) description of their topic for participant registration.

### **Receipt of Submissions**

See ConfTool Manual, Appendix D, for on-line submittal instructions.

All hard-copy conference abstract submissions will be sent to the Headquarters Staff. The Headquarters Staff will document receipt of the material, and will determine timeliness and document arrival date if late fees are to be assessed. 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 review the terrestrial and the underwater submissions. The panel reviewing terrestrial submissions is made up of Site Committee members, typically the Program Chair and Terrestrial Program Director, as well as any others interested and available to assist. The panel reviewing underwater submissions is made up of the Program Chair, Underwater Program Director, and the ACUA Underwater Abstracts Review Committee. The Underwater Program Director should review all submitted abstracts, in case underwater-related abstracts not noted as such are submitted, to ensure all underwater submissions are provided to the underwater panel. The underwater abstracts should be provided to the panel by 10 July, to allow sufficient time for review and comment to the Conference Chair and Program Chair by 20 July, in case of any issues arising.

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. 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 by 25 July to a panel formed by the SHA President, President-Elect, and immediate Past President for consideration. This Presidential Panel, in consultation with the Ethics Committee and technical experts of their choice, should that be necessary, will return a decision to the Conference Chair and program panel before 31 July. The decision-making process used by the SHA Presidential Panel is included in the SHA Procedures Manual.

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 any 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. Occasionally, a contributed paper may fit well into a proposed symposium, in which case the Program Chair should contact the symposium organizer to ask if

the paper might be added to their session; acceptance is up to the symposium organizer. 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. 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 sessions 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 or 9:00 AM and 5:00 PM, Thursday through Saturday. By this stage of program planning, the exact number (usually 10-12), 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) Site Committee scheduled Sunday morning sessions, and that experiment seems to have worked well. Another alternative is to ask submitters to present posters instead of papers. These options 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 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 audiovisual 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.

ConfTool has a function to assist with avoiding conflicts on the schedule, but vigilance on the part of the organizers is essential.

### *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 by substituting a later paper. Vacant time should be filled by impromptu remarks, comments from the floor, or an unscheduled break. 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 may draft a short questionnaire to provide to Session Chairs to aid in fulfilling this task. Guidelines must be provided to 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. A remote control to advance images is especially helpful, and many have integrated laser pointers.

Rooms for panels/forums should be outfitted with a lectern and microphone for the moderator and table(s) and chairs at the front of the room for the panel participants. An additional microphone may be useful for the participants to share if the room is large. One or more rooms

should be designated for panels/forums so the set-up can remain unchanged throughout the conference.

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 is 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. Headquarters Staff has large SHA sign boards with space for printed session program inserts; inserts are legal (11 x 14") size, portrait orientation. Easels are required for these sign boards. Many hotels have digital signs outside each session room that may be used.

### *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 on 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 an 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 Site 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 so attendees know where to sit. 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:

- Number of roundtable topics to be offered, not to exceed 10 per day, and the days the roundtables will be scheduled
- Schedule of which topics on which days
- Size of each discussion group ( $\leq 10$ ) and minimum number needed for each group
- Identify the individuals who will lead each discussion group and obtain a short description of each topic for registration
- 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 for sign-up, 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
- Transportation (if necessary)

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 (1992). 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*

The Past Presidents' Student Reception 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.

Because many students are under legal U.S. drinking age, alcoholic beverages generally are not provided. Finger foods and snacks along with a range of soft drinks make up the menu.

### *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 conferees. 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, locale, 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**

Appendices A and B provide timelines for planning the conference; see Appendix A for monthly and Appendix B for daily conference planning schedules. *These timelines are not intended as a substitute for studying the contents of this Manual but rather are a quick reference guide to aid conference organization and planning.* See also Appendix D for the ConfTool schedule.

Ideally, four (4) years prior to the 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 (6) 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 next scheduled meeting (usually January and June) to the Headquarters Staff for distribution. The Board may take up to six (6) to nine (9) months to make a decision. During this timeframe, they may ask questions and request changes.

Three (3) 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 to develop an acceptable contract for the SHA President’s 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 *SHA Newsletter* updates about the conference once it is relatively certain to be included in conference activities.

Meeting announcements are as follows:

The preliminary Call for Papers is prepared in January, one year before the conference, and provided to the *SHA Newsletter* Editor for publication in the *Spring Newsletter*.

The Preliminary Program should be compiled by early August and transmitted to the *Newsletter* Editor for publication in the Fall issue no later than 31 August; the Preliminary Program should also be delivered to the Webmaster for posting on the SHA website. On-line advance registration through ConfTool should be available for use on 1 October.

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 one month 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 for delivery to the printer no later than 30 November. 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, monthly financial records are to be provided by the Headquarters Staff to the Site 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 Site Committee. By the end of June, all records including the final Conference Report, financial summary, and all records are to be provided to the SHA Conference Coordinator and to the SHA Secretary for archiving.

## **VI. REGISTRATION**

### **INTRODUCTION**

Major responsibilities of the Headquarters Staff are:

- Produce the preregistration packet with input from the Site Committee
  - Receive and process hard-copy abstract submissions and preregistration forms and payment
  - Supervise on-site registration during the conference with support from the Site 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, and to work with the Awards Committee Chair to handle the complimentary registrations that are part of the benefits for some of the awards.

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 Site 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 Site 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. With the 2010 conference in Amelia Island, FL, the ConfTool system was introduced; see the ConfTool Manual section, Appendix D, for a full description of the system and instructions for coordinating with Headquarters Staff on its set-up and use.

## **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; see Appendix A for monthly and Appendix B for daily schedules to guide planning.

### **Abstract Submittals**

By 1 May the official Call for Papers should be provided to the SHA Webmaster for posting on the SHA website and ConfTool should be open for all abstract submissions. All abstracts must be submitted, either through ConfTool or hard-copy to the SHA Headquarters, no later than 30 June in order to allow the Site Committee time to develop the Preliminary Program. With the introduction of ConfTool, preregistration fees are no longer required with abstract submittal, although may be re-instituted in future.

### **Publishing the Preliminary Program and Conference Registration Information**

Preliminary program and conference registration information must be compiled by early August in order to be delivered to the *Newsletter* Editor by the 31 August deadline for publication in the Fall *Newsletter* and delivered to the SHA Webmaster to post on SHA website. Because the registration information describes the conference in some detail and allows 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;

- Ground transportation information;
- Day care availability;
- Dance and reception plans;
- Events such as the ACUA/SHA Archaeological Photo Contest and workshops;
- Preliminary program
- Deadline for refunds

Whoever 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 on-line registration deadline should be approximately one month prior to the conference. Historically, this deadline has been set as 1 December. This deadline marks the peak workload for processing advanced registration forms. Registration forms will continue to arrive after this date but will decrease in frequency. Procedures must be clearly established to record incoming material and payments.

A deadline of 31 December for refunds should be set and printed on the registration form and be included on the ConfTool registration page.

### **Designing the Registration Form**

It is crucial that the ConfTool and hard-copy registration forms are *exactly* alike. Confusion can, and will, arise if any discrepancies exist between the forms. Because the forms tend to change slightly from conference to conference (different tours, workshops, events, etc.), the Conference Chair and Program Chair must be vigilant to ensure both ConfTool and hard-copy versions match precisely.

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 (see Section IV).

### **PROCESSING REGISTRATIONS BEFORE THE CONFERENCE**

Hard-copy registration forms are to be sent directly to Headquarters Staff to be processed. Any forms sent by mistake to the Site Committee should be forwarded directly and promptly to SHA Headquarters.

As registrations are processed, summaries should be generated periodically and distributed to the Site 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.

## **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
- 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, ACUA Board members, conference staff and volunteers (may be 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" 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. Recent conferences have provided attendees with commemorative tote bags that contain the registration packets and any other conference information and items; these usually are funded by sponsors who can have their logos printed on the bags. Registration packages are prepared shortly before the conference by Headquarters Staff, Site 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 size with the blanks printed on 8 x 11" 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 registration receipts and whatever special items they have requested (tickets, etc.) or are entitled (ribbons, etc.). Packets should be labeled on the outside with the registrant's 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 bag 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 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 Site Committee, 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 Staff 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. Two secure T1 phone lines are needed to process credit card payments at the Registration Center and should be included in the conference contract.

Other equipment will include standard office supplies such as staplers, pencils, pens, staple removers, paper, trash baskets, etc. A large freestanding bulletin board 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. Registration can open early to allow preregistrants to pick up their packets after check-in, with full registration services starting later in the day. This will help prevent long lines from developing. Workshop attendees appreciate being able to pick up their packages early Wednesday morning.

The ACUA Board 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 Table 6 in the section on awards so that registration perks can be coordinated by SHA Headquarters, the Awards Committee Chair, and the Conference 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 is 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
  - 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 and Prize Presentations

### *Introduction*

The Society has numerous awards and prizes. Refer to Table 6. 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 Book 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 (renamed in 2011 as the Kathleen Kirk Gilmore Dissertation Award), as well as the Québec City Award/Bourse de Québec, and the Ed and Judy Jelks Student Travel Awards. The Daniel G. Roberts Award for Excellence in Public Historical Archaeology, created in 2011 through an endowment from John Milner Associates, Inc. to honor their colleague Dan Roberts, celebrates exceptional efforts in the area of public historical archaeology, and was presented for the first time in 2012. The Advisory Council on Underwater Archaeology provides the George R. Fischer International Student Travel Award for a student presenting a maritime-focused paper who must travel internationally in order to attend the conference. The Gender and Minority Affairs Committee provides two Harriet Tubman Student Travel Awards each year with the goals of increasing diversity and encouraging student involvement at the meetings.

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, such as at the plenary session and at the Business Meeting. 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 work closely with the Society's Awards Committee Chair to plan, schedule, and implement the awards ceremony (Section IV). The following tasks must be completed in coordination with the SHA Awards Committee Chair by the Conference Chair, the Program Chair, or Local Arrangements Chair, as appropriate:

- Scheduling the awards and prize ceremonies on the program – Conference Chair or designee with Awards Committee Chair
- Arranging any special presentation needs – Conference Chair or designee with Awards Committee Chair
- Including honoree(s) name(s), address(es)/affiliation(s), and a brief description of accomplishments in the printed program – Awards Committee Chair provides all awards- and

prize-related information to Conference Chair or designee and proofs those sections of program after it is prepared

- Confirming the attendance of honoree(s) – Awards Committee Chair
- Assisting with accommodations and registration – the Awards Committee Chair provides awardee names so the Conference Chair can make appropriate hotel reservations and SHA Headquarters staff can provide complimentary registrations
- Providing a hospitality escort to Society events and functions, including airport transportation, if necessary - Conference Chair or designee with Awards Committee Chair

The presentation of the highest-tier Society awards, which normally occurs immediately following the banquet, is a prestigious event and should not be scheduled against any other conference function.

#### *ACUA/SHA Archaeological Photo Competition*

The ACUA/SHA Archaeological Photo Competition is the responsibility of the ACUA. The ACUA will coordinate with the local Conference Program Chair to ensure on-site details, such as a sufficient number of display panels to post the photos, are handled. A minimum of 3 display panels should be set up near the Conference Registration, or other suitable area, by Wednesday at 12 noon. It is preferred that the Photo Competition is NOT in the Bookroom due to the need to break down the Bookroom in a hurry to set up for the Public Day, Awards Banquet, or other event which may be scheduled for the same space. The ACUA/SHA Archaeological Photo Competition drop-off box should be placed near the Conference Registration desk, preferably in clear view of the Registration staff to ensure security, by Wednesday, 12 noon.

The Underwater Program Chair serves as a member of the Photo Competition judging committee; the rest of the judging committee is designated by ACUA. Winners typically are announced at the Friday Business Meeting, so their names should be provided to the Awards Committee Chair by noon on Friday.

#### Board and Committee Meetings

The SHA and the ACUA Boards 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 committee 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 Site Committee in cooperation with Headquarters Staff must schedule space for each committee meeting, except for the Awards Committee meeting which is organized by the Awards Committee

Chair. Several methods for accommodating committee meetings have been tried, some with better results than others.

An experiment at the 2006 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.

Another plan was to schedule the committees in two shifts: 3:00 PM – 3:45 PM and 3:45 PM – 4:30 PM and to not have any paper presentations offered at that time. The Annual Business Meeting followed 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. This method, however, limits space and time available for symposia.

At the 2010 Amelia Island meeting, committees were scheduled to meet Thursday, Friday, and Saturday mornings from 7:45 AM until 8:45 AM, with symposia scheduled to start at 9:00 AM. This enabled committee members to attend their meetings without missing any papers, but did require a quick turn-around time to get meeting rooms re-set for presentations, which may not always be possible.

Scheduling committee meetings is one of the major challenges for conference organizers, and a perfect solution has not, to date, been found. Choose the best option for your particular venue, considering space available, overall conference agenda, and possible scheduling conflicts.

### **Workshops and Caucuses**

Various special interest groups may request space for business meetings or open workshops in addition to the SHA-sponsored workshops. Among those most regularly asking to be accommodated are the 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 audiovisual 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, audiovisual equipment, refreshments for breaks, and to include the preprinted workshop information and registration in the preregistration package. The SHA 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 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 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/Bookroom. During the meeting, the Site 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 digital 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 PowerPoint 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)
  - Remote-controlled image advancers are very useful, and most have an integrated laser pointer
- 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/remote-control image advancer
- 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 service made available to conferees if it can be arranged. 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 is 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 Exhibits 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. While the Headquarters Staff is responsible for soliciting, booking, and processing payment from exhibitors, the Program Chair must coordinate closely with Headquarters Staff for room size needs, room set-up, and general organization.

The Society for Historical Archaeology welcomes exhibitors who share its mission and code of ethics at the annual Conference on Historical and Underwater Archaeology. SHA strongly adheres to its Ethics Statement (<https://sha.org/about-us/ethics-statement/>). Exhibitors in the SHA Bookroom should not display or offer for sale at any SHA Conference publications related to unethical activities or projects, such as those by treasure hunting, antiquity selling, or commercial firms that exploit cultural heritage. Should any publication of this nature be identified by the SHA in the Bookroom, the publisher will be directed to remove the publication from his/her table immediately. To be clear, a publisher may produce such a book, but they cannot display it, sell it, or otherwise offer it at the SHA Conference.

### *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 Site 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 conference and generally are included in the book award for the Student Paper Prize. The Program Chair is responsible for collecting donated books and any other items and delivering to the Awards Committee representative.

The Local Arrangements Chair, Conference 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 may be needed if the poster sessions are included in the Exhibits Center and poster boards must be secured.

### *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 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 Site Committee, generally an Exhibit Center/Bookroom Coordinator, in close consultation with the Headquarters Staff. The Exhibit Center/Bookroom Coordinator's name and contact information should appear in the conference Program and should be available in the Bookroom. Prior to the meeting, the Headquarters Staff coordinates with the Local Arrangements Chair to provide instructions to exhibitors/vendors for shipment of display materials, primarily publications, to the venue. Some hotels, especially those associated with in-house or near-by conference facilities, will accept shipments of display materials. If the hotel does not accept such shipments, the Local Arrangements Chair or Exhibit Center/Bookroom Coordinator is responsible for receiving, storing, and transporting such shipments to the conference facility. Exhibitors and vendors are responsible for setting up their own displays, break down, packaging for shipment, and return shipping their materials.

Once the Exhibit Center is set up, the Exhibit Center/Bookroom Coordinator will have little to do until break down, other than occasionally checking with exhibitors to make sure they have what they need. A small kit containing general office supplies, packing and duct tape, scissors and box cutters, etc. will prove most useful. Be aware that some exhibitors will decide at the last moment they need electrical outlets or other services – exhibitors should coordinate with Headquarters Staff and/or the hotel/conference facility directly as a fee for these services normally is charged which is the responsibility of the exhibitors and not the conference budget.

### *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 - ~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 (can be later if a Public Session is not scheduled for the same space Saturday afternoon)
- Breakdown - Saturday, 1:00 PM - 3:00 PM; not open to conferees. If the Public 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
    - 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, the Conference Chair should be prepared to succinctly comment on and answer questions about the conference. The Conference Chair is expected to deliver a brief update to the SHA Board during the Wednesday Board meeting.

Finally, the Conference Chair should plan to address the membership at the Friday Annual Business Meeting to comment on attendance, the number of papers scheduled, number of terrestrial and underwater symposia and posters, and other relevant information. The Conference Chair for the following year should deliver the official invitation for SHA to travel to that city for the conference, including brief descriptions of venue attractions and comments on planned events to generate member interest, enthusiasm, and attendance.

## **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.

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 Site Committee staff, to decide. The Amelia Island 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 Conference 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 should be submitted to the SHA Conference Coordinator in electronic format as a PDF document for further distribution.

## APPENDIX A: SHA CONFERENCE PLANNING SCHEDULE BY MONTH

(see also Section B: Timeline in Appendix D: ConfTool Manual for additional information)

### YEARS PRECEEDING CONFERENCE

#### 4 Years Prior To Conference, any time between January and November

- Draft “Proposal to Host Conference” delivered to Conference Coordinator; Conference Coordinator will return draft with comments by 6 weeks from receipt.

Following March

- 1 March deadline for revised Proposal to be submitted to Conference Coordinator.
- Conference Coordinator submits the Proposal to the SHA Board for discussion at the next scheduled meeting; Board may take up to 6-9 months to make a decision, and may ask questions of the potential organizers.

#### 3 Years Prior To Conference

- Site Committee finalized.
- Site Committee should attend all intervening Conferences and consult with organizers.
- HQ Staff finalize hotel negotiations and develop hotel contract for SHA President signature.
- Site Committee surveys conference location for tours, events, reception venues, etc.
- Site Committee works on securing institutional support, in-kind support, etc.

#### 2 Years Prior To Conference

- 1 December - Brief notices sent to *AAA Anthropology News*, *NPS Common Ground*, *Current Anthropology*, *SAA Archaeological Record*, and *SPMA Newsletter*, as well as to any local/regional archaeological societies. Notices also sent to HISTARCH, ARCH-L, ACRA-L, SUB-ARCH, and others as deemed appropriate.
- 1 January - General announcement of the meeting sent by the Conference Chair to the *SHA Newsletter* Editor for the Spring issue. The announcement should be updated each quarter with information on conference theme, hotel accommodations, proposed tours, and key conference personnel, as appropriate.
- Work with SHA Webmaster to set up conference website, populate with general announcement and preliminary info on hotel, local attractions, local history, etc. Update regularly as info becomes available.
- 1 April deadline for Conference Chair to send status report to Conference Coordinator for inclusion in the mid-year report to the SHA Board.

### YEAR BEFORE CONFERENCE

#### January – Previous Conference

- Provide flyers and information, along with any advertisements and marketing materials, for next conference to be included in conferee’s registration packets; also make available at Bookroom table.

- Address membership and Board at the conference Annual Business Meeting to formally invite to following year conference and to provide a detailed report.
- Meet with the current conference organizers to review their experience.
- After the conference, prepare the Preliminary Call For Papers.

#### February

- Provide Preliminary Call For Papers to SHA *Newsletter* Editor for Spring *Newsletter* and to SHA Webmaster to post on website.
- Finalize ConfTool contracts.
- Work with ConfTool designer Harald Weinreich to set up “blank” ConfTool site.

#### March

- HQ Staff sends draft of Exhibitor Prospectus to Conference Chair for comment.
- Continue becoming familiar with ConfTool.

#### April

- 1 April deadline for Conference Chair to send status report to Conference Coordinator for inclusion in the mid-year report to the SHA Board.
- Continue becoming familiar with ConfTool.

#### May

- 1 May deadline to provide official Call For Papers to SHA Webmaster to post on SHA website and to open ConfTool for submissions.
- 15 May deadline for Conference Chair to return Exhibitor Prospectus draft to HQ Staff with any additions or revisions.

#### June

- Work on negotiating and finalizing contracts for tours, receptions, special events, transportation, A/V, etc.
- 30 June deadline for abstracts for symposia, contributed papers, and posters to be submitted.
- 30 June deadline for Conference Chair to begin communication with Awards Committee Chair about the progress of awards and prize decisions and notifications.

#### July

- 10 July deadline for Underwater Program Director to send underwater submissions to ACUA Abstracts Review Committee for review.
- 20 July deadline for Underwater Program Director and ACUA Committee to notify Conference Chair of any ethical issues with underwater submissions.
- 25 July deadline for Conference Chair to report ethical issues with submissions to Presidential Panel.
- 31 July deadline for Presidential Panel to make determination on any ethical questions related to submissions and relate to Conference Chair.
- July 31 deadline for Conference Chair to check in with Awards Committee Chair for update and to make mutual decision on where and when different awards will be presented at the conference.

#### August

- Early August hold “scheduling party” to compile Preliminary Program. Be sure to allow time for subsequently organizing and creating the hardcopy of the Preliminary Program for publication in the *SHA Newsletter*. Make sure you consult with the *Newsletter* Editor regarding publication deadlines, and allow sufficient time for this stage.
- 31 August deadline to provide completed Preliminary Program to *Newsletter* Editor for Fall *Newsletter* and to Webmaster to post on SHA website.
- 31 August deadline for Program Chair to notify presenters of paper acceptance or rejection.

#### September

- 1 September deadline to announce that presenters can review the preliminary conference schedule in ConfTool.
- 30 September deadline for all participants to make any necessary corrections in ConfTool.

#### October

- 1 October advance on-line registration opens.
- Mid-October deadline for papers to be withdrawn without penalty.
- Site Committee makes any final program revisions and local arrangements.

#### November

- 30 November deadline to provide completed Final Program to printer.
- With HQ Staff, develop preliminary numbers for tours, special events, Banquet, etc and make any adjustments to arrangements.

#### December

- 1 December deadline for advance on-line registration.
- 15 December deadline for all printing to be completed and delivered to venue.
- 31 December deadline for refunds to participants.

### **CONFERENCE**

#### January

- Pre-conference, confirm and train all volunteers.
- Pre-conference, prepare registration packets.
- Address Board at Annual Business Meeting with attendance numbers and other information.
- See Appendix B: SHA Conference Planning Schedule by Day

### **AFTER CONFERENCE**

#### February

- With HQ Staff and SHA Treasurer, complete payments to Workshop leaders.
- Site Committee Chairs and Coordinators complete their conference reports and submit to Conference Chair as soon as possible.

#### May

- Deliver completed Conference Report to Conference Coordinator, respond to any comments and submit to SHA Board for mid-year meeting in June.

- Provide any updates/revisions for *Conference Manual* to Conference Coordinator.

## APPENDIX B: SHA CONFERENCE PLANNING SCHEDULE BY DAY

### TUESDAY

#### ACUA Board of Directors Meeting

8:30am – 5:00pm

- Room should be large enough to contain a meeting table for 25, usually arranged in a hollow square, and additional chairs to seat ~10 at the back/sides of the room.
- Breakfast and lunch are provided and are arranged by the local committee (although ACUA generally provides some funding to offset the cost); usually catered by the hotel; enough for 25 people.
  - Breakfast – generally continental in style (bagels/muffins with spreads, fruit, coffee/tea/juice)
  - Lunch – generally buffet in style (sandwich breads/meats/cheeses, condiments, pasta/potato salad, chips, soft drinks/tea/coffee) or boxed sandwiches
- Electrical outlets are needed for computer use, usually need extension cords and powerstrips; AV equipment/microphones are not needed

#### Registration

Set up

- Approx 6 long tables, depending on available built-in space – coordinate need with HQ Staff
- Need reliable internet connection for on-site registrations
- Need 2 single phone lines – coordinate with HQ Staff
- Need trash cans at registration desk
- Need approx 20 easels – HQ staff has some, hotel usually provides some per the contract
- Coordinate with HQ staff and volunteers to stuff registration bags – usually need some tables set up in an out-of-the-way location
  - Make sure bags, printed Programs, give-aways, literature, and other info is ready and staged

#### Break-Out Rooms

Set up

- Make sure hotel has arranged chairs, podium, microphone, screen, projector cart, electrical, and projector (if hotel is providing AV)
  - Secure laser pointer/auto-advancers – HQ has some pointers, get extra batteries
- Coordinate with hotel for locking rooms at night – get key or lock code, assign person to make sure rooms are secure

#### President's Reception

~ 6:00pm – 8:00pm; usually in Presidential Suite

- Generally about 50 people – coordinate with HQ staff and SHA President on final number
  - Expect more people to show up than have RSVP'd
- Generally hors d'œuvres/fingerfood and beer/wine/soft drinks, can have cocktails depending on budget

- If outside beer/wine/liquor can be brought in, it will save tremendous costs over having the hotel provide it – check with hotel as some will not allow this
- Coordinate with hotel to provide bar set-up (cups/ice/napkins)
- Recruit a couple of grad students to serve as bartenders; the hotel will provide staff for food service/clean-up

## **WEDNESDAY**

### **SHA Board of Directors Meeting**

8:30am – 5:00pm; can be held in same room with same set-up as ACUA meeting the previous day

- Room should be large enough to contain a meeting table for 20, usually arranged in a hollow square, and additional chairs to seat ~10 at the back/sides of the room.
- Breakfast and lunch are provided and are arranged by the local committee; cost should be included in conference budget; usually catered by the hotel; enough for 20 people; can be same as for ACUA meeting.
  - Breakfast – generally continental in style (bagels/muffins with spreads, fruit, coffee/tea/juice)
  - Lunch – generally buffet in style (sandwich breads/meats/cheeses, condiments, pasta/potato salad, chips, soft drinks/tea/coffee)
- Electrical outlets are needed for computer use, usually need extension cords and powerstrips; AV equipment/microphones are not needed

### **Workshops**

half day and/or full day; usually in some of the break-out rooms

- Make sure rooms are open early for workshop leaders to access for set-up
- Lunch is generally not included and attendees get it on their own, but provide workshop leaders with a list of local restaurants or options in the hotel
  - Coordinate with the hotel to make sure their restaurant is ready since close to 200 people will be breaking for lunch at around the same time and most want something quick and convenient.

### **Tours**

half day and/or full day

- Bus arrangements need to be made well ahead of time
  - Make sure hotel has sufficient space for large buses
  - May want to arrange for bottled water aboard buses for attendees
- Need to arrange lunch for full-day tours
- Usually schedule a volunteer in addition to tour leader to help herd attendees
  - Tour leader and volunteer costs are figured into the price of the tour
- Make sure areas to meet are clearly signed and will not interfere with workshops (the assembled groups tend to be noisy)
- Have volunteers ready to direct people to proper meeting area for each tour
- Make sure tour leaders are on time and also know where to meet
- Buses may need to be handicap-accessible

### **Bookroom Set-Up**

10:00am – 5:00pm; Bookroom

- HQ Staff should be on hand to assist vendors and make sure payments are in order
- Make sure Bookroom Coordinator is present
- A small kit containing tape/scissors/string/boxcutter/etc will likely be helpful

### **Government Maritime Managers Forum**

3:00pm – 5:00pm; usually in one of the break-out rooms or small conference room

- Generally about 30 people attend
- Can set up with head table for 5-10 and additional chairs as audience, or can set up tables as hollow square with seating for 20-30
- ~10 chairs at back or sides of room for additional people is good
- Usually do not need AV, but coordinate with organizers

### **Plenary Session**

~ 6:00pm – 8:00pm; usually in the Grand Ballroom or largest meeting space

- Coordinate with plenary organizers and Awards Committee Chair (if awards will be presented at this event), but usually need:
  - raised dais with table and chairs for leaders/speakers, possibly microphones on table (if more than a couple of microphones, may need audio technician and mixing board)
  - podium with microphone
  - large-format projector and screen; laptop; electrical
  - audience chairs for 200 or more
  - microphones available for audience if questions/discussion expected

### **Opening Reception**

~ 8:00pm – 11:00pm; any large space

- Usually snacks and beer/wine/soft drinks. Depending on budget, could have free beer/wine until it runs out then a cash bar, or could have drink ticket(s) included in registration packet. Soft drinks usually free throughout.
- Could have a band or DJ
- Might want tables for new books or other special promotions
- Might want a microphone for official welcome (SHA President and/or Conference Chair)
- Consider outdoor heaters if outside
  - Have a contingency plan for any outdoor activities in case of inclement weather/temperature
- Know your budget latitude in case more food/beverage is needed

## **THURSDAY**

### **Committee Meetings**

can be scheduled anytime; 7:45am – 8:45am has worked as it's before papers start so it avoids scheduling conflicts for committee members; usually in break-out rooms

- Get list of committees and number of members of each from HQ to determine sizes of rooms needed
- Could be held in one large room, such as where the Roundtable Luncheons will be, with a table for each committee (although some committees are quite large)

- Do not need AV or microphones
- Some committee chairs may want to arrange breakfast or coffee – have them coordinate directly with the hotel and pay the hotel directly as this is not covered in the conference budget
- The Budget Committee traditionally meets over lunch on Friday, 12:00-1:30pm, usually in the Presidential Suite (see Friday schedule)
- The Awards Committee arranges its own committee meeting

### **Symposia**

~ 9:00am – 12:00 – morning; break-out rooms

~ 1:00pm – 5:00pm – afternoon; break-out rooms

- Rooms are assigned to individual symposia during the program meeting that typically happens in late summer before the conference
- HQ has large sign boards with insert space for symposia schedules. Paper size for inserts is legal, portrait orientation. Local committee creates and prints the inserts – do this before the conference!
  - Assign someone to be in charge of changing the signs
  - Sign boards typically are placed on easels outside each room
- Have a Sharpie on hand to cross out cancelled papers and tape to attach extra pages to the sign boards for long symposia

### **Poster Sessions**

~ 9:00am – 11:00am – morning; break-out room/inside Bookroom/in lobby area – need enough room for people to move around the boards to see the posters without undue crowding

~ 1:00pm – 3:00pm – afternoon; break-out room/inside Bookroom/in lobby area

- Can use as much or as little of this time as is needed, depending on number of posters submitted
- Need to arrange for large poster boards; most are free-standing, double-sided, ~4 ft x 8 ft
  - If the hotel does not have poster boards, they will need to be rented from an outside vendor. Remember to arrange delivery and pick-up.
- Have push pins/Velcro/tape on hand as someone is sure to forget it

### **Roundtable Luncheons**

12:00 – 1:00pm; large room or hotel restaurant

- Can be held on any combination of Thursday, Friday, and Saturday, depending on number proposed
- Can be any number of topics per day, but usually 5-6 and no more than 10, depending on number proposed and size of space
- Tables are generally for 10-12 people – need to find out size of tables from hotel as this will determine the number of spaces at each table that can be sold
  - Remember to deduct space for the luncheon leader(s) from number of spaces available
- Coordinate with hotel for lunches, often box lunches with choice of sandwich but could be plated
- Need to create and print out signs for tables with title of topic so people know where to sit
  - A standard sheet of paper folded in half will make a small “tent” that can be printed

### **Past Presidents’ Student Reception**

~ 4:00pm – 5:30pm; larger room

- Approximately 150-200 people usually attend
- Snacks and soft drinks, free for students
  - Alcoholic beverages generally are not served due to many students being under-age
- Some tables/chairs and highboys are good but do not need seating for everyone as this is more of a “milling about” reception
- Can be scheduled any time, but should not conflict with any other conference reception or event

### **Off-Site Reception**

~ 6:00pm – 9:00pm; any interesting venue but generally a local museum

- Hotel or venue might be able to help with organizing catering
- Bus transportation generally needs to be arranged; can include with arrangements for tours
- Often features notable local food/drink; usually has cash bar
- Can have band or DJ
- Can have theme but do not have to

### **Silent Auction**

Often in conjunction with Off-Site Reception but does not have to be; need enough space for tables to display items and people to move around

- Make sure auction items get to the venue and unsold items are collected at the end
- Need tables to hold auction items and auction sheets
- Need auction sheets, clipboards, and pens; make sure pens are attached to clipboards or have extras!
- Silent Auction Coordinator should work with HQ Staff to organize process for payment and item pick-up by successful bidders

## **FRIDAY**

### **Committee Meetings**

Same as previous

- The Budget Committee traditionally meets over lunch on Friday, 12:00-1:30pm, usually in the Presidential Suite
  - Food arranged by the Site Committee and usually catered by the hotel; cost included in conference budget
  - Approximately 10 people
  - Can be plated, or buffet-style

### **Symposia**

Same as previous

### **Poster Sessions**

Same as previous

### **Roundtable Luncheons**

Same as previous

### **Past Presidents' Luncheon**

12:00 – 1:00pm; usually a restaurant away from but close to the hotel

- Need to make reservations but attendees pay on their own
- Usually 15-20 attendees, need to give final number to restaurant when known
- Should be either very close or need to arrange transportation

### **ACUA Board of Directors Meeting**

3:00pm – 5:00pm; small conference room

- Usually about 15 people attend
- Need small conference table and chairs
- No AV or microphone

### **SHA Business Meeting**

~ 5:30pm – 6:30pm; large space

- This meeting is open to SHA membership so should have audience-style seating for about 100 people
- Need raised dais with table and 12 chairs for Board
  - 6 microphones on table; need audio technician and mixing board
  - Electrical outlets for computer use (extension cords and powerstrips)
- Coordinate with SHA President and the Awards Committee Chair for any additional needs (the format of the meeting tends to change)
  - May need: podium with microphone on dais and/or on floor, AV, additional electrical

### **Pre-Awards Banquet Cocktail Hour**

~ 6:30pm – 7:30pm; usually lobby/foyer outside Banquet room

- 2-3 cash bars; highboy tables
- May want candles for tables

### **Awards Banquet**

~ 7:30pm – 9:30pm; largest space

- Coordinate with Awards Committee Chair (who hosts or co-hosts the event) regarding format of the awards ceremony and to obtain text for Awards Banquet program (250 were printed for the 2012 event)
- Coordinate with HQ for numbers; coordinate with hotel for number that can fit in the space
  - Usually approximately 200 people
  - Also need ~50 chairs for people attending just the Awards portion, which is open to membership
- Generally 70% chicken or beef/20% fish/10% veggie
- Front tables should be reserved for Board, Awards Committee Chair, awardees and guests, and presenters; need RESERVED signs
- Need podium with microphone, laptop, large-format projector and screen; auto-advancer
- Usually a sizeable saving if local committee can provide table centerpieces
- Have cash bar conveniently but unobtrusively located inside the room
- Need one 6-foot table in unobtrusive location at front of room (possibly behind the screen) where the awards can be laid out prior to their presentation

### **Dance**

~ 9:30pm – midnight (depending on what the hotel will allow); large space\*

\*The Dance often has been held in the same room as the Banquet which usually causes a long delay to clear tables and give time for the band or DJ to set up. If the Dance can be held in another location much time will be saved (the Banquet *always* runs long anyway).

- **Silent Auction** can be held in conjunction with the Dance
- 2-3 cash bars, tables and chairs, highboys
- Coordinate with band or DJ for time to set up and break down

## **SATURDAY**

### **Committee Meetings**

Same as previous

### **Symposia**

Same as previous

### **Poster Sessions**

Same as previous

### **Roundtable Luncheons**

Same as previous

### **Public Archaeology Event**

half day or full day; large room at hotel or off-site

- Open to the public and can be anything
  - Activity booths
  - Public lectures
  - Demonstrations
  - Partnering with a local archaeological site for an all-day event
- Coordinate with the Public Education & Interpretation Committee, which assigns a member each year to work with the local committee on this event to develop ideas
- Can be in afternoon in same room as Bookroom, but need to plan for breaking down the Bookroom vendors and setting up for Event
- If off-site need to arrange transportation for conference attendees

### **Saturday Receptions**

- An official event can be planned, but Saturday is often a “free” evening for conference attendees
- Some people must leave Saturday evening so important official events are avoided this night
- Generally a good time for publishers to hold book signing receptions, or for other special interest groups to meet or host receptions

## APPENDIX C: SHA CONFERENCE NEEDS FOR INCLUSION IN HOTEL CONTRACT

- Room accommodation numbers per night. As an example, the following rooms were held for the 2014 Québec conference:

Sat	5
Sun	5 (Saturday and Sunday days are not always included)
Mon	25
Tues	100
Wed	350
Thurs	350
Fri	350
Sat	250
Sun	20
- Room rates, including days before and after the conference that will be honored at the SHA rate
  - In 2010, it was 3 days before and after; in 2014, 2 days before and after
- Number of complimentary rooms – this number usually is dependent on how many rooms are sold at the conference rate and should be specified in the contract
  - At least 1 suite - the Presidential Suite - should be complimentary. A suite for the Conference Chair may also be negotiated.
- Incidental fees, such as luggage handling, parking, bell services, etc, should be specified to be charged to the individual, not to SHA
- Room upgrades or discounts should be specified
- Food costs, including the per-person Banquet cost, food for the Tuesday ACUA Board meeting and the Wednesday SHA Board meeting, food for the Budget Committee meeting, and any other catered food needed within the hotel must be specified. The hotel contract will include a stated minimum amount of food and beverage revenue to be returned to the hotel by the participants in partial exchange for free use of meeting space. The Banquet is normally an important means of reaching that minimum.
- At least 2 secure T1 phone lines are needed for on-site registrations paid by credit card and should be provided by the hotel at no additional fee
- WiFi in meeting rooms should be complimentary
- If possible, negotiate for complimentary WiFi in all attendees' rooms
- Negotiate complimentary use of easels and SHA storage room space
- Make sure any other perks are listed, such as complimentary access to pool/gym, valet parking, etc
- Specify date at which the room block number can be reduced with no penalty
  - Typically 30 days from start of event
- Make sure all meeting rooms are listed by name each day needed, as well as table/chair/AV set-up for each room
- Make sure all AV equipment provided by the hotel is listed

- Remember to include large-format projector for Awards Banquet, walkie-talkies for staff communication, sound board and mixer for multiple microphones in Business Meeting, any special needs for Plenary Session, etc
- Specify cost for electrical outlets in Bookroom and be sure to inquire into setup fees for using the space
  - Make sure cost for these is paid by vendors as part of Vendor Contract
- Contracts are expected to include at least one complimentary room night per 40 paid room nights, although it is sometimes possible to increase the room return to as much as 1:30
- Many hotel contracts are commissionable, although the percentage of commission to be paid by the hotel may vary. The commission is paid to the SHA and is part of the income generated by the meeting.

## APPENDIX D: LIVING IN CONFTOOL LAND - THE CONFTOOL MANUAL

By the SHA 2011 Program Committee  
For the Society for Historical Archaeology

A. Important People, Definitions, and Terms.....	112
B. Timeline.....	113
C. Multiple Roles: The effect on double booking and other implications .....	119
D. Miscellaneous Topics .....	120
E. Processing Submissions (prior to Scheduling Party).....	121
F. The Scheduling Party.....	127
G. Assigning Chairs in ConfTool: For Organized Symposia and for General Sessions.....	129
H. An Alternative Suggestion: Producing program and signage from <i>within</i> ConfTool.....	129

## A. Important People, Definitions, and Terms

1. Harald Weinreich ([harald@weinreichs.de](mailto:harald@weinreichs.de)) is the creator of ConfTool, an expert programmer, and is most helpful with any questions or issues that arise. Harald is in Germany, so keep the time difference in mind when emailing or needing something ASAP.
2. Michael Ashley ([lifeisnotstill@gmail.com](mailto:lifeisnotstill@gmail.com)) worked with Harald and SHA to select and tailor ConfTool to its particular needs. Utilize Michael Ashley's communication abilities to work with Harald for most of your needs.
  - a. Ashley is a professional archaeologist and long-time SHA member who has been involved in assisting with the program for several years. He knows the history of what works, and what doesn't, in terms of how the SHA program is created and what ConfTool can, or can be made to, do.
  - b. He is also a computer programmer and knows how to communicate SHA's culture and needs to Harald (who is a programmer but *not* an archaeologist) in ways that will ensure the best results.
3. "Session" refers to any time block for any purpose – a symposium, a general session, a forum/panel, etc. Use the word "Symposium" to refer to organized symposia, for which people submit proposals.
4. "Program" refers not only to the scholarly program (planned by the Program Chair and Terrestrial/Underwater Program Directors) but also to the overall "Conference Program". There needs to be more specific discussion of the difference between them, especially with relation to who is primarily responsible for entering information into and managing ConfTool. Everyone who is responsible for a primary area of the overall Conference Program should be able to enter in and manage ConfTool for their part of the program.
  - a. However: One option would be to have certain people designated as "Conference Track Chairs". This enables the chairs to see all submissions to their track, and to re-order them. The question then becomes at what point you pull this capability away so that the program can be locked down and final. Michael Ashley can help you work through this issue.
5. Key for terms used by ConfTool:
  - REG – Registration
  - GEN – General Session or paper
  - PLN – Plenary Session or paper
  - SYM – Organized Symposia or paper
  - PAN – Organized Panel/Forum
  - POS – Poster
  - RTL – Roundtable Lunch
6. Key for terms used by Program Builder, to build Index:
  - FO – Forum Organizer
  - FP – Forum Participant
  - GC – General Session Chair
  - GP – General Session Participant
  - PP – Poster Presenter
  - PS – Plenary Speaker
  - RT – Roundtable Participant
  - SC – Symposium Chair
  - SO – Symposium Organizer
  - SP – Symposium Participant/Discussant

## B. Timeline

(see also Appendix A: Conference Planning Schedule by Month for additional information)

### 1. January

- a. Decide on your time blocks and include information about their length in the preliminary Call for Papers so that people will have them in mind as they begin to think about sessions (in order to maximize your flexibility later on, you don't have to be specific, just says that you will require time blocks of a certain length).
- b. Any time block paradigm can be created, so it may be an idea to “internally” create smaller time blocks around critical periods, like lunch, that can be combined. For example, you could have 30 minute time blocks in and through lunch hours - 11:30/1:30 - for extending and staggering sessions. The trick would be to use them consistently on any given day, so that the conflict checker will work. Michael Ashley can help you decide about this.
- c. Bear in mind that there are some events with which you cannot overlap so that all conference participants can attend. These include the Plenary Session (usually on Wednesday night), the Thursday night social event, and the Friday night Business Meeting and Awards Banquet.
- d. Here are some potential scenarios.
  - i. Your daily time slots could be in 1:15 hour segments, with a 15-minute break between them. You would not have to worry about breaks in the middle of sessions because they would be built in already. This would allow a total of up to (30) 15-minute time slots every day in every room. You would still need to allow for setup time required for committee meetings, but you could lose a time slot after a meeting with less impact on the overall schedule. Here is how that scenario would look:
    1. 8:00 – 9:15 (all committee meetings during this slot, but other sessions could be here too)
    2. 9:30 – 10:45 (in the rooms in which there is a committee meeting at 8 am, this block would be kept free to allow for the setup switch. This can be entered into ConfTool so that you do not inadvertently schedule a session here.)
    3. 11:00 – 12:15
    4. 1:00 – 2:15
    5. 2:30 – 3:45
    6. 4:00 – 5:15
  - ii. Or, you could choose 1.5 hour segments instead, which would allow up to 36 papers a day in rooms with no committee meetings. Here is how that scenario would look:
    1. 8:00 – 9:30 (committee meetings and sessions, as above)
    2. 9:45 – 11:15 (time block kept free if needed, as above)
    3. 11:30 – 1:00 (note that in this scenario, papers would be held during the noon hour. Deleting this block is one option, but having sessions all day is something that other conferences have done, so you could consider it.)
    4. 1:15 – 2:25
    5. 2:30 – 3:00
    6. 3:15 – 4:45
  - iii. Or some other scenario of your choosing.
    1. **Note that time blocks do not need to be all the same length. Nor do they need to be the same every day.**

- a. As long as they do not overlap each other, then ConfTool’s conflict checker will still work.
- 2. Whatever scenario you choose, be sure and allow time on the schedule for *at least* 15-minute breaks between sessions; 30 minutes is better in case the first session runs long.
- e. Decide when you will schedule Committee Meetings
  - i. They can be scheduled either throughout the day or at the same time every day. For the last two years they have been scheduled from 7:45 – 8:45 in the morning, and no scholarly sessions have started before 9:00 am.
  - ii. Upside of this method: No committee meetings are scheduled at the same time as symposia. Plus, because no a/v is required for most meetings, you would not have A/V costs for the “committee rooms”.
  - iii. Potential downside of this method: Depending on the venue’s room changeover policies, this can restrict the amount of time that can be allotted for symposia in any given room, and can also increase the number of breakout rooms that are needed for symposia.
    - 1. The 2011 Austin hotel required at least an hour to switch from a committee setup to a symposium setup; if a committee meeting ended at 8:45, no symposium could start in the same room until 10:00 am at the earliest.
    - 2. However, in 2010 the Florida venue was able to do fast room changeovers, so they could accommodate a 9:00 am symposium time. Therefore having the committee meetings from 7:45 – 8:45 worked well.
  - iv. **Therefore our recommendation is to find out *very early* what the venue’s policies will be, and plan accordingly.** Either way, we recommend the following:
    - 1. Create time slots for meetings just as you create the time slots for the other sessions. You would treat meetings just like other ConfTool events.
      - a. Ask the meeting organizers/chairs to enter their meeting into ConfTool, and to enter in the committee members’ names in as participants (or to provide the Program Committee with a list to enter in the names).
    - 2. If you do this, ConfTool and Program Builder can then pick up scheduling conflicts between committee participation and symposia participation.
- f. Prepare the Preliminary Call for Papers. The following listing itemizes some particularly critical topics that need to be covered (use previous CFPs for the basic outline and other ideas).
  - i. The date that the online abstract submittal period will open.
  - ii. Whether you will allow both Macs and PCs, and whether people need to bring their own computers (presuming your A/V deal doesn’t cover this). Then say this again in an email blast to all participants right before the conference.
  - iii. Hotel information and the date that people can book rooms.
    - 1. Consider posting a separate page on the web site about the hotel because it can get “lost” in all the other info in the CFP.
  - iv. Information about the difference between ConfTool registration and Conference registration.
  - v. A reminder about the need to sign on as a new ConfTool user *every* year.
  - vi. Emphatic statements about the need to enforce paper times
    - 1. Later, be sure and train volunteers to come get a Program Committee member if needed to “enforce”.

2. Volunteer chairs of general sessions may be less comfortable cutting people off than are the chairs of organized symposia.
- vii. A description of how you want people to format their sessions. This can be brief and expanded upon in the “real” Call for Papers posted later on, but you can tell people early on what size your time blocks will be.
  1. The way ConfTool compares session times means that it is necessary to set up fixed session times which do not overlap each other in *format* - that is, you can't have a 1.5 hour session running at the same time as a 2-hour session, because ConfTool won't pick up a conflict between people who are in both.
- viii. A prominent link to your FAQ Google Docs page (use previous examples as a starting place if you wish).

## 2. February

- a. Submit the Preliminary CFP to the *Newsletter* Editor (verify the deadline)
- b. Renew Harald's contract and get “blank” site set up.
- c. Decide who will have various levels of access and start practicing with ConfTool.
  - i. Ideally you should have several people who have full administrator access and *are willing to learn ConfTool well*.
  - ii. This could include the Program Chair, the Local Arrangements Chair, and at least two other people (in addition to Michael Ashley). The 2011 team had the Program Chair, the Terrestrial and Underwater Chairs, and one of the Conference Co-chairs.
  - iii. HOWEVER, in practice everyone should agree that a *smaller* number of people should actually make most of the changes needed, although specific people need to have access for specific tasks. For example:
    1. Only the Program Chair or Conference Chair should be allowed to change the access settings for any other person or any other ConfTool settings.
    2. The Underwater Director needs to have access to review proposals, create submission tracks, and deal with participant problems.
    3. The Terrestrial Director needs to have access to review proposals, create submission tracks, and deal with participant problems.
    4. The Program Chair needs to be able assign other tasks as needed (inputting room data, creating time blocks, assigning chairs, ordering sessions, correcting errors that come up, etc.)
    5. It is possible to have symposium chairs manage their own sessions. Michael Ashley can review this process with you.
- d. Start updating your FAQ list and update as needed throughout the process. Michael Ashley will provide you with passwords for the Google doc.
- e. Decide if you want to have International Liaisons on your committee and, if so, recruit them.
- f. Other early steps (January, February)
  - i. Set up a special mailbox for participant communications so your personal or work email inbox is not flooded; this is the address which ConfTool will use to send and receive emails. A dedicated gmail or hotmail (or similar) account can be monitored by the Program Chair, although others can have the password.
  - ii. Explore the previous year's site to see what it looks like. Look at settings, mail functions, export functions, etc.
  - iii. At some point, each person who will be using ConfTool should create a sample session of the type he/she will be “supervising” (this can be deleted later). There

- should be a “virtual training session” in which everyone learns how to create sessions and add papers.
- iv. Experiment with exporting data for different uses (can use the previous site for this if needed).
  - v. Experiment with cutting/pasting data into Word directly out of ConfTool (sometimes it works better to copy/paste into Word than it does to export it to Excel). Michael Ashley can also show you how to save the entire program to a file for offline editing.
3. March, April
    - a. Continue learning ConfTool
    - b. Continue making other conference arrangements (see *Conference Manual*).
    - c. Using the Preliminary CFP as a start, begin preparing the *online* Call for Papers.
  4. May 1
    - a. Post the online Call for Papers to the SHA web site and open the submission process.
    - b. The online CFP is essentially the same as the Preliminary Call for Papers, with any added information you have by then (for example, by this time you should have information about tours).
    - c. Advantage of doing this by May 1: if you wait until summer, many people will not be able to submit their abstracts because they are in the field. Therefore, their symposium chairs must do this, which aggravates the already-large problem with varying emails, spellings, affiliations, etc. If you can post the online CFP earlier, you will avoid some of these problems.
  5. May, June
    - a. Process each symposium, forum, or panel proposal as it comes in, and create the necessary submission tracks (see Section E.2.). Communicate with symposium organizers as needed to make changes on their submissions. *Do not wait until the scheduling party to do this – do it along the way.*
      - i. However, do not formally *accept* any submission until a Program Committee person checks to make sure it is complete and accurate. You can use the “Internal Remarks Only for Chairs” to indicate to your committee what has been done, awaits doing, etc. You can accept them either as-you-go, or all at once.
    - b. Processing procedures are described in Section E, “Processing Submissions”. See also Section C, “Multiple Roles.”
    - c. By the end of June, Conference Chair should begin communication with the Awards Committee Chair about progress of award decisions and notifications.
  6. June 30
    - a. Suggested deadline for submissions.
    - b. On this date, close the door in ConfTool. The Admin can reopen/close it at any time, in “Settings”.
  7. July
    - a. Review abstracts.
    - b. Submit any problematic abstracts - due to ethical problems, etc - to the SHA Presidential Panel for a decision. Give the Presidential Panel enough time to make a decision before July 31.
    - c. By the end of July, the Conference Chair should check in with the Awards Committee Chair for awards update and make a mutual decision about where the various awards and prizes should be presented.
  8. August (preferably early in the month)

- a. Gather for a “scheduling party” to finish scheduling all sessions, events, etc and compile Preliminary Program. See Section F, “The Scheduling Party”.
  - b. Program Chair should notify presenters of paper acceptance or rejection by August 31.
    - i. Decide if you will send a formal acceptance, or if you will do an informal email blast that the program is open for viewing and that if they are on it people could consider themselves accepted. Not everyone needs a formal letter (and bear in mind the problem of non-validated emails – you cannot be sure that everyone will receive automated or group emails). Sending a letter is not hard to do, however, and some people will want them. One option is to tell people you will do this if they ask (for example, frequently international attendees will need an official letter for their visas).
  - c. Submit Preliminary Program to *Newsletter* Editor and Webmaster by August 31.
9. After the scheduling party:
- a. Recruit and assign chairs for general sessions. See Section E.2.g, “How to Assign Chairs”.
  - b. Add discussants, organizers, and chairs to all sessions and forums so they appear in the program (ConfTool does not automatically do this).
    - i. Suggestion: have a committee person do the recruiting and enter them into ConfTool as they are recruited. Or, prepare a list for someone else to enter them in.
  - c. Invite selected sessions to have invited status - this can be done either during the submission process or later on. Once you do, you can go into ConfTool and indicate those as "invited”.
  - d. Make sure all event information is entered into ConfTool properly – social events, meetings, tours, and workshops.
    - i. Each person who is in charge of a program area (Local Arrangements, Workshops, Tour and Events Chair, individual Committees, Roundtable Luncheons) should enter “their” events into ConfTool.
      - 1. An alternative would be for these individuals to provide the information so that it can be entered in by the Program Committee.
      - 2. However, if someone serves on the *Site Committee*, they should be willing to enter in and “manage” their own areas of the program.
      - 3. Individual committee chairs could have their submissions entered in by the Program Committee, however, if the Program Committee prefers that.
    - ii. The Program Committee can then check all entries for accuracy and communicate with these individuals as needed to make changes.
    - iii. Likewise, each program person should be responsible for proofing “their” entries in both the final online program and the printed program.
  - e. Continue to review online program, check, double check, and run conflict checker as needed.
10. September 1
- a. Announce that people can view the preliminary schedule in ConfTool and should make any corrections (send an email blasts to SHA membership *and* ConfTool users, plus a Histarch and Subarch posting).
  - b. Begin working with the Headquarters Staff to finalize the conference registration form
    - i. They will prepare the form, but you need to work together to ensure that your information meshes with theirs. For example, in 2011 the numbering method for Roundtable Luncheons was different in “their” system and ConfTool.
11. September 30

- a. Deadline for all participants to check their session to make sure they are correct in all respects.
    - i. All participants should check the spelling of names and affiliations, email addresses, session order – everything
    - ii. Tell everyone (via email blasts to SHA members and ConfTool users) that it is *their* responsibility to check the online program for accuracy, and that after the date you stipulate *no changes will be accepted*.
  - b. This is the date when you will close online changes and begin to finalize and format the printed program.
    - i. This deadline is up to you and will depend on your print deadlines and how much time you need to format and proof the final program. It will also depend on your choices regarding using direct ConfTool output, Program Builder, etc.
  - c. Conference Chair should remind the Awards Committee Chair that all award- and prize-related material for the final conference program must be submitted by the end of October.
12. After this deadline has passed, work with Michael Ashley to begin creating your final printed program document, using Program Builder and/or ConfTool output.
13. October 1 (or whatever date you and the Headquarters Staff decide upon)
- a. Open advance on-line conference registration. The Headquarters Staff will send an email blast to both ConfTool users and SHA members.
  - b. Make sure that what is on the Headquarters Staff form matches what ConfTool generates.
- October 31
- c. Awards Committee Chair submits all award- and prize-related material for the final conference program.
14. November 30 (suggested)
- a. Deadline to provide completed final Program to printer.
  - b. Awards Committee Chair submits all awards- and prize-related material for the final Program before it is provided to the printer.
15. December 1 (or whatever date the Headquarters Staff decides upon)
- a. Close advance on-line conference registration. After this date all registrations (and changes to existing registrations) have to be done on site.
  - b. By no later than December 15, Awards Committee Chair provides text for Awards Banquet program to Conference Chair or takes care of it within the committee.
16. Immediately prior to Conference
- a. Plan for your conference “office” as needed. Gather a computer, printers, paper, office supplies. Exchange information about cell phone numbers, committee members’ schedules, etc.
17. During Conference
- a. Troubleshooting
    - i. Have some sort of message board in the conference office.
    - ii. Have a provisional schedule for the entire team for their other events so you will know how to find them if needed. Post it on the board.
    - iii. The hotel will probably provide you with radios or similar, but make sure you have all exchanged your cell phone numbers to use as well. Post those on the board.
    - iv. The Technology Committee for SHA is working on social networking policies. Coordinate with them to help setup electronic communication channels – Facebook, Twitter – as well as the SHA main site. The more ways that the same clear messages

can be put out there, the better. Twitter, for example, was very successfully used in 2011.

- b. Signage during Conference
  - i. These can be produced directly from the text of the printed program and adjusted during the conference if needed. In 2011, creating the basic signs took one person several days on the computer, just before the conference. These were all put on a jump drive and transferred to the “office” computer, so that during the conference different people could update and print them as needed.
  - ii. For the first couple of days of the conference, someone was pretty much at the computer doing this nearly all the time.
  - iii. Work with the hotel to provide electronic signage if possible.
- c. Volunteers
  - i. The Program Chair should participate in on-site volunteer orientation if possible.
  - ii. Provide guidance for the volunteers about problems that may arise during sessions, with A/V, sessions which run overtime, etc.
  - iii. Contact previous Volunteer Coordinators for advice on this.

#### 18. Post-Conference – on site

- a. Breakdown your “office”. You will probably need to be out by Saturday night, unless you make other arrangements with the hotel ahead of time. Therefore some members of your team will need to be available.
- b. Have a well-deserved drink in the bar!

#### 19. Post-Conference – later on

- a. Get attendance information from the Headquarters Staff about the numbers of attendees in each workshop, so you can invoice the Headquarters Staff for the workshop leader payments (all of whom receive ½ of the registrant fees).
- b. Update this manual with what *you* learned!

### C. Multiple Roles: The effect on double-booking and other implications

Problems with people being “double-booked” emerge because sometimes people chair or organize one symposium, co-chair or co-organize a second, serve as discussant in a third, present a paper in a fourth, and then co-author a paper in a fifth, plus serve on a panel or two on top of this. All of these roles are “legal” but cause great difficulty with scheduling.

Following are the roles people can have and the policy described in the 2011 Call for Papers, plus a couple of additional categories that occurred in practice. 2011 Site Committee comments and suggestions are included.

1. **Primary Symposium Organizer (or Chair).** People can serve in this capacity *one time* during the conference.
  - a. Organizers versus Chairs: In practice at the conference, organizers often serve as chairs, but not always. These should be the same person, in order to reduce the number of potential conflicts, but the program will not prevent it from being done a different way. You can decide whether you want to do something else in terms of *process*.
2. **Primary author of paper *or* poster.** People can serve in this capacity *one time* during the conference.
3. **Secondary author or secondary organizer.** People can serve in this capacity as many times as desired. This was a mistake...although we did say that no protection was offered for “double booking” secondary authors and organizers, in fact we managed to avoid it but it

took a great deal of time and effort. The temptation is to try, especially when people are asking you personally to do so, and it sometimes becomes quite difficult.

4. **Discussant.** People can serve in this capacity *one time* during the conference.
5. **Panelist or Moderator in a panel/forum.** People can serve in this capacity as many times as desired. This was a mistake. Even though we said we would only attempt to protect each participant from being “double booked” once, several people signed up for more than one panel. We also asked those who wished to participate in more than one panel to let us know their primary choice. *No one did this.*
6. **Organizer or Chair of a panel/forum.** We did not address this in the CFP but should have. Sometimes these are different people.
7. **Committee Member or Board Member.** If you do not account for these on ConfTool, conflicts can occur if you schedule committee or Board meetings during the same time blocks as symposia. Recommendation: Schedule everything within ConfTool, including all meetings.
  - a. Even though most of the committee meetings were held from 7:45-8:45 am, mostly avoiding this problem, a couple were held at the same time as symposia (e.g., the Friday ACUA Board meeting). Recommendation: Ask the chair of each meeting to enter in his/her committee into ConfTool under “Meetings” and to list the names of the members who are expected to attend.
8. **Roundtable Luncheon Leader.** This may cause conflicts if your sessions have to bleed over into the time assigned for the luncheons.
9. **Technology Exhibit Leader.** This was new in 2011. We had to protect the person in charge of this during the set up/break down period for the exhibit.

#### **D. Miscellaneous Topics and Helpful Hints**

1. Awards Committee/Program Committee interface
  - a. The chair of the SHA Awards Committee needs to be in your loop so that he/she can have input into decisions that affect the awards. The Awards Committee Chair is your “go-to” resource for any questions regarding awards or prizes.
  - b. The Awards Committee needs to know your deadlines for the program as early as possible so the committee can make its decisions in time for the program. The Awards Committee Chair provides the Conference Chair with all awards- and prize-related material for the final program.
  - c. The Awards Committee prepares the presentation used during the awards ceremony and should also prepare the Awards Banquet Program (or at least provide the text for it to the Conference Chair).
  - d. In 2011, the Awards of Merit were given at the plenary, which helped the Awards Banquet stay on time by having fewer awards to present. In 2012, additional awards were presented at the plenary. Coordinate with the Awards Committee Chair early on (July) if you choose to do this again, so that it is taken into account in your plenary timing.
2. ConfTool Output tools: Exporting to Excel and Cutting/Pasting to Word
  - a. The 2011 team created a number of spreadsheets with ConfTool output and used them for a variety of purposes. These were especially useful during the scheduling party.
  - b. You can also cut/paste ConfTool output into Word and use it for various things.

- i. You can, if you choose, use this output to produce the signage as well as the final program. You need to experiment with this to determine to what extent you wish to use this.
- 3. Other paper planning tools
  - a. The 2011 team had a monster “all conference” spreadsheet, which our Local Arrangements Chair created and kept updated. This was used to communicate with the hotel and with each other.
  - b. 2011 also used a Word table to evaluate empty spaces in rooms for the final phase of scheduling. This may not be needed if you keep the session times standard throughout, but we found it helpful.
- 4. Plenary
  - a. The 2011 team comped conference registration and at least one room night each (three nights for the person who came from Europe) for each Plenary speaker. Each year’s committee needs to make its own choices about this issue based on the sort of plenary it has in mind and the number of comp rooms available.
- 5. Roundtable Luncheons
  - a. The Program Chair should assign members of the Program Committee to handle submissions, review and accept them, and to manage them during the conference itself (e.g., create and deliver table signs, etc.).
- 6. Posters
  - a. The Program Chair should assign members of the Program Committee to review and accept these, and to ensure that display panels are available during the conference.
  - b. Coordinate with the ACUA and Underwater Chair, because display panels also are needed for the ACUA/SHA Archaeological Photo Competition.
- 7. Technology Session (in 2011 held in the “Archaeology Marketplace,” or Bookroom)
  - a. The Program Chair should assign one person to interface with the Technology Committee to plan and implement this.
- 8. Email blasts
  - a. Be aware that sending too many may create “message fatigue” and increase the chances that some will be ignored. Emails should also be as brief as possible and written as bulleted lists, to increase the chances that they will be read.
  - b. However, important email blasts should be sent both to ConfTool users (not all of whom are SHA members) and SHA members (not all of whom will have signed on to ConfTool). Insert the usual “apologies for cross posting” message. A message to Histarch and Subarch for some things is also recommended (especially the preliminary call for papers). Also, consider using your International Liaisons to help you distribute information to other listservs.

#### **E. Processing Submissions (prior to Scheduling Party).**

- 1. Important: there is no automatic connection between the “Contribution Details” for any given Symposium Proposal (or Panel Proposal) and what appears in the ConfTool Schedule. This reality has a number of ramifications.
  - a. Adding chairs to a symposium has to be done manually, after it is “created” in ConfTool (see Section E.2.g, “Assigning Chairs”).
  - b. Adding Discussants also has to be done by creating a submission for each one. The Program Committee should do this.

- c. Names and affiliations on Symposium proposals do not necessarily relate to the user's *actual* name and affiliation on their user data. This has to be checked by a *person* – the software will not necessarily pick it up.
- a. Note: ConfTool will identify people as the same person if the email address is the same – but it often isn't. A “one e-mail per member” rule in ConfTool should be enforced.
2. Creating Tracks and Sessions: What to do when a symposium proposal is entered into ConfTool by a user.
- Note that links will need to be updated each year for the new Conference Committee!***
- a. Contained in this section are instructions for:
- How to Create a New Symposium
  - How to Add Symposia to the Schedule
  - How to Assign Papers to Symposia
  - How to Enter Hard-Copy Paper Submissions into ConfTool
  - How to Assign Chairs within ConfTool (so they can see and edit their symposia as needed)
  - How to Delete a Symposium or Forum from the Schedule
- b. Prior to the submission period, revise the automated letter that currently goes out with each submission, as needed.
- c. How to Create a New Symposium
1. Go to:  
<http://www.conftool.com/sha2011/index.php?page=adminToolContributionTypes>
  2. Select the last entry in the list (click on it; Michael Ashley will create a starting entry for you to use)
  3. Select "Copy as new Submission Type"
  4. In the new window, enter the Title of the Symposium and the e-mail addresses of the chairs – pull from List of Contributions  
<http://www.conftool.com/sha2011/index.php?page=adminPapersBrowse>
  5. Click on "Create new Submission Type/Track"
- d. How to Add Symposia to the Schedule  
(everything you need is under [Conference Program Scheduling](#))
1. Set up rooms. [Rooms for Conference Sessions](#)
  2. Set up Time Periods for Sessions. These are the segments of time for all the events. For example, the general sessions happening on Thursday from 1-6pm... If you need another slot of 2 hours for a symposium, you'd create another time period for Thursday from 1-3, for example.
  3. [Create, Configure and Delete Sessions](#). Herein create the sessions. All that is needed is to select the time period and room assignment. NOTE: The system WILL tell you if you choose a room conflict.
  4. [Results of the Reviewing Procedure](#). This is where the magic happens. Here, you choose the papers for a session. You can filter by type, to just look at posters, general papers, symposia, etc. NOTE: You modify the order of papers in another step.
  5. At this point, good to look at the [Sessions](#) program and see how things look. Here is a very powerful set of tools. You can select any session, re-order papers, edit session details, etc.
  6. Assign conference chairs. This could/should happen in step 3, if you know them. Can be done anytime, sooner is better, see step 7!
  7. [Analyze Presenters and Chairs of the Conference Agenda](#). Will run checks to see if people are giving more than one presentation, are in conflict time wise, etc.

- e. How to Assign Papers to Symposia  
 (once individual papers are accepted by the system, it's easy to assign them to either planned or general symposia)
1. Easiest to have two windows open:
    - 1<sup>st</sup> window: [Results of the Reviewing Procedure](#)
    - 2<sup>nd</sup> window: <http://www.conftool.com/sha2011/sessions.php>

4:00pm	Location: <b>Amelia Conference Center Foyer</b>							
3:00pm - 5:00pm	<b>PAN-04: Government Maritime Managers Forum XVIII: Drowning the Miller</b> Location: <b>Talbot B</b> Chair: <b>Victor T. Mastone</b>							
6:00pm - 8:00pm	<b>PLEN-01: Coastally Connected: Current Ethical and Preservation Dilemmas on Land and Underwater</b> Location: <b>Amelia Ballroom 3 &amp; 4</b> Chair: <b>Ian Charles Burrow</b> Chair: <b>Amanda Evans</b>							
8:00pm - 11:00pm	<b>Opening: Reception</b> Location: <b>Beach Club Pool Terrace</b>							
<b>Date: Thursday, 07/01/2010</b>								
9:00am - 10:30am	<b>CON-09: The Archaeology of Freedom</b> Location: <b>Talbot B</b> Chair: <b>Megan A. Teague</b>	<b>ORG-23: 2010: An Aerospace Archaeology Odyssey</b> Location: <b>Conference 1</b> Chair: <b>William Earl McAlexander Jr.</b>	<b>ORG-24: Learning from the Landscape: Gardens and Country Houses in Early America</b> Location: <b>Conference 2</b> Chair: <b>Richard F. Veit</b>					
9:00am - 11:00am	<b>POSTER-1: Poster Session 1</b> Location: <b>Amelia Foyer</b> Poster Session 1							
9:00am - 11:30am	<b>CON-01: Material Culture Studies in Historical Archaeology</b> Location: <b>Ossabaw B</b> Chair: <b>Charles D. Cheek</b>	<b>ORG-01: Under Siege: Gulf Coast Commerce, Industry, and Conflict During the Civil War</b> Location: <b>Cumberland A</b> Chair: <b>William B Lees</b>	<b>ORG-02: Archaeology in the Borderlands West: 300 Years of Intercultural Connections</b> Location: <b>Ossabaw A</b> Chair: <b>Ashley Peles</b>	<b>ORG-03: Pre-Collegiate Applied Archaeology in Action</b> Location: <b>Conference 1</b> Chair: <b>Sarah E. Miller</b>	<b>ORG-06: Current Research in the Mocama and Timucua Mission Provinces of La Florida</b> Location: <b>Talbot A</b> Chair: <b>Robert L. Thunen</b>	<b>ORG-34: Lincoln Archaeology</b> Location: <b>Conference 3</b> Chair: <b>April M. Beisaw</b>	<b>ORG-36: Charles Town and Beyond: The Evolution and Adaptation of Town and Country (1670 - 1740)</b> Location: <b>Conference 4</b> Chair: <b>Katherine A. Saunders</b>	<b>ORG-40: Prisoner-of-War and Internments Archaeology (19th - 21st centuries)</b> Location: <b>Cumberland C</b> Chair: <b>John H. Jameson</b>

EXAMPLE: I'm going to work on ORG-23, 2010: An Aerospace Archaeology Odyssey

In the Results window, select the symposium from the pull-down window. Only the papers associated with this symposium will then be listed.

3	-	0 / 0	233	"An Arch Pub "Star Kitch	Community Archaeology and Contemporary Identities: Closing the Gap between Past ... African Historical Archaeology: Diasporic Conversations Technology Across the Divide: State of the Art Tools for Terrestrial and Marine ... Discovering the Past along Mexico's Hidden Coast: Historical Archaeology in Nort... Lincoln Archaeology	0 messages
4	-	0 / 0	449	"Eac Spa Cem	"Loudly Bellows the Wave of the Sea Against the Land": The Archaeological Eviden... Re-assessing the Archaeology of Fort George Island, Florida: 1587-2009 <b>2010: An Aerospace Archaeology Odyssey</b>	ORG-16 0 messages
5	-	0 / 0	335	"Fer Cha Adap	Confederate Shipbuilding Prisoner-of-War and Internments Archaeology (19th - 21st centuries) Proto-Colonial Fortifications Archaeology in the Borderlands West: 300 Years of Intercultural Connections The Spatial Archaeology of Identity: Past, Present, Future The Chesapeake in the Atlantic World	0 messages

Carry on choosing ORG-23 from the pull-down under Session on the right, for all the papers.

### Results of the Reviewing Procedure

Overview of the reviewers' evaluations with the option to set the acceptance status of each submission and to assign them to a session of the conference.

>>> **Show Filter Options**

Track / Type of submission: 2010: An Aerospace Archaeology Odyssey

Acceptance Status: Any contribution status

Search [ ] Per Page: All

4 entries on the list. Page 1 of 1

Points	Reviews Span	ID	Contribution Title	Author(s) Submitting Author	Acceptance Status	Session Forum
1	0 / 0	714	Archaeological Reconnaissance Survey of a Jupiter Missile Crash Site, Cape Canaveral Air Force Station, Brevard County, Florida · Terrestrial Program	Penders, Thomas Edward Penders, Thomas Edward	Accepted Edit Status	ORG-23
2	0 / 0	217	Bush Planes of the Alaskan Frontier · Terrestrial Program	Camp, Jennifer Beth Camp, Jennifer Beth	Accepted Edit Status	ORG-23
3	0 / 0	216	From Ships to Airships to Spaceships: Thoughts on Purpose and Design · Terrestrial Program	McAlexander Jr., William Earl McAlexander Jr., William Earl	Accepted Edit Status	ORG-23 0 messages
4	0 / 0	681	What's going on in aviation archeology? Recent projects on the aviation archaeology front. · Terrestrial Program	Fuller, Craig Andrew Fuller, Craig Andrew	Accepted Edit Status	ORG-23 0 messages

> [index](#) > [adminPapers](#) > [adminPapersResults](#) Print View

Imprint - Contact Address: dscottireton@uwf.edu  
Conference: SHA 2010 Conference Software - ConfTool Pro 2.4.14  
© 2001 - 2009 by H. Weinreich, Hamburg, Germany

When done, you will see that the link on the session is now in red on the sessions overview:

11:00pm	Location: Beach Club Pool Terrace							
<b>Date: Thursday, 07/01/2010</b>								
9:00am - 10:30am	CON-09: The Archaeology of Freedom Location: Talbot B Chair: Megan A. Teague	ORG-23: 2010: An Aerospace Archaeology Odyssey Location: Conference 1 Chair: William Earl McAlexander Jr.	ORG-24: Learning from the Landscape: Gardens and Country Houses in Early America Location: Conference 2 Chair: Richard F. Veit					
9:00am - 11:00am	POSTER-1: Poster Session 1 Location: Amelia Foyer Poster Session 1							
9:00am -	CON-01: Material	ORG-01: Under Siege:	ORG-02: Archaeology	ORG-03: Pre-Collegiate	ORG-06: Current	ORG-34: Lincoln	ORG-36: Charles Town	ORG-40: Prisoner-of-

And you will see the papers listed when you click the link. Presto!

## Session Overview

### Session

#### ORG-23: 2010: An Aerospace Archaeology Odyssey

Time: Thursday, 07/01/2010: 9:00am - 10:30am

Location: Conference 1

Session Chair: William Earl McAlexander Jr.

### Presentations

#### What's going on in aviation archeology? Recent projects on the aviation archaeology front.

**Craig Andrew Fuller**

AAIR, Aviation Archaeological Investigation & Research, United States of America

#### Archaeological Reconnaissance Survey of a Jupiter Missile Crash Site, Cape Canaveral Air Force Station, Brevard County, Florida

**Thomas Edward Penders**

45th Space Wing, USAF, United States of America

#### Bush Planes of the Alaskan Frontier

**Jennifer Beth Camp**

College of William and Mary, United States of America

#### From Ships to Airships to Spaceships: Thoughts on Purpose and Design

**William Earl McAlexander Jr.**

Arkansas State Highway and Transportation Department, United States of America

- f. How to Enter Hard-Copy Paper Submissions into ConfTool
  1. Create a new user account for them using the "New User" link on the overview page:  
<http://www.conftool.com/sha2011/index.php?page=adminUsersNew>
  2. Tick "Generate user name and/or password..." so they will receive their username and password (if they have provided an email address).
  3. Save the data with "Submit and Begin with Submission of a Contribution"
  4. Here you can select the submission type and submit the paper. They will receive an email about this as well.
  5. If you do not have all email addresses, just use the email address of the submitting author for all co-authors.
  6. If the user already holds an account, you can also select "New paper" on the list of users: <http://www.conftool.com/sha2011/index.php?page=adminUsersBrowse> (right column)
- g. How to Assign Chairs within ConfTool  
(so they can see and edit their symposia as needed)
  1. Select the chair(s) of a symposium:  
[http://www.conftool.com/sha2011/index.php?filter=show&page=adminUsersBrowse&form\\_status=author&specialfilter=-&form\\_deleted=no](http://www.conftool.com/sha2011/index.php?filter=show&page=adminUsersBrowse&form_status=author&specialfilter=-&form_deleted=no)
  2. Click on "Edit" and assign the status "TrackChair" to him/her.
  3. In the next step you can assign the according symposium to him/her and then s/he will have access to all submissions of his/her symposium.
  4. Chairs can then log-in. When they do, they can go to the "Overview page", then "Manage Submissions and Reviews" and select the "List of Contributions"
- h. How to Delete a Symposium or Forum from the Schedule  
NOTE: Nothing is ever deleted in ConfTool, just hidden.
  1. Go to Edit the Conference Schedule.

2. From main page: [Overview](#) > [Scheduling](#) > [Edit the Conference Schedule](#)
3. Select the session you want to edit, for example:  
[SYM-107: 2nd International Symposium for Recent, International Advances in the Use of pXRF and Other Portable, Field Technologies for Archaeochemical Studies of Historic and Classical Era Sites](#)
4. Click the [Edit Sessions](#) button
5. Where you see the Session Number, set this to NONE. This un-assigns it.
6. Then you can delete it from the schedule.
- i. Create submission tracks BEFORE you accept symposia or papers, and only accept symposia or papers after everything is submitted and checked. As each submission comes in, a committee member needs to check it carefully. NOTE: The automated email that ConfTool sends needs to be adjusted (do not use the generic one that is currently in ConfTool). Update it however you wish, but be sure and include information that no submissions will be accepted until the following things are done.
3. **Require that everyone listed on a submission (including co-authors) needs to be listed as a ConfTool user and assigned a user number.**
  - a. Doing this will ensure that the information for each person is consistent for each submission where that person is included. Either they can enter themselves in, or the chair can do this for them, but the former is *strongly* recommended.
    - i. Not requiring this can cause *many* difficulties, especially in terms of finding conflicts later on and producing the program. Some of the difficulties were:
      1. Names were entered in different ways by users and the organizers/chairs.
      2. Emails were entered in different ways by users and the organizers/chairs.
      3. Affiliations were entered in different ways by users and the organizers/chairs.
      4. Co-chairs and discussants of symposia could not be added to a session because their name did not appear in the search window of ConfTool users.
  - b. Make sure all participants' email addresses are the same as that entered into their user info.
    - i. There were many problems with this in 2010 and 2011, caused in part by the fact that organizers were often trying to submit a symposium proposal while their participants were in the field (thus submitting for other people and getting the names/emails slightly wrong). Or using alternate emails, which amounts to the same thing. If you can open the submission process a bit earlier it may, to some extent, mitigate this problem.
  - c. Make sure all participants' email addresses have been validated.
    - i. If they are not, tell the chair that it will not be accepted until this is done. The ramifications of non-validated addresses are:
      1. ConfTool relies on email addresses as the central hub of how a "user" is managed. This is a very good feature -- to some extent it mitigates the problem of slightly different names -- but *lots* of people used different emails for different submissions.
      2. You cannot be sure that people are getting the emails you send to them.
      3. Bounce-backs were numerous – mainly because of various spam filters that block the automated messages.
  - d. Make sure the symposium meets your requirements for session times.
    - i. If they are not, you can ask that they find another presenter, add a discussion segment or a discussant – etc. What they do should be up to them, but you can ask them to do something.

- e. Note that individuals can, if they wish, submit uninvited papers to organized symposia tracks. Committee *and* symposium chairs should watch for these submissions and deal with them as they come in. There typically are not very many.
- 4. Open your submission period early, and keep it open longer. *You can do this because you no longer have to print the preliminary program in the Newsletter.* This change “bought” at least two months on the schedule.
  - a. This will give participants more time to submit for *themselves*, instead of the organizers submitting for them, and will give you more time to review all symposiums before you formally accept them.
  - b. For example, if you tell people that their symposium has to fill a certain time period, you can watch for incorrect ones as they come in, and tell people right away when they have submitted something that is not workable. *You should not accept anything until it is correct.*
    - i. You can (and should) allow flexibility within the time blocks, but people should have to stay within those time blocks. Therefore, they will not be able to invite as many people as they want, come one - come all. If they want a big session, they can have one, but it would need to fit into the time blocks you stipulate.
    - ii. There likely will be some resistance to this, so be sure and mention it very early, in a prominent place in the Preliminary Call for Papers.
  - c. You may have a few people who need you to submit proposals on their behalf because they do not have computer or internet access. *You should* do this on a case by case basis, but you will not have many who need this service.

## F. The Scheduling Party

This will take about two *full* workdays, on site; 10-12 hours each day is not uncommon. Travel expenses to attend should be included in the budget. A long table with computers is helpful; you will need internet access and a printer. If possible, have Michael Ashley present to coordinate and drive data entry, and to answer questions and solve problems on site.

1. Here is what you should have *already* done by the time you gather for this party.
  - a. All symposia have been reviewed for accuracy to ensure they meet your submission guidelines.
    - i. The Underwater Chair has reviewed the UW symposia with the ACUA committee and accepted them into ConfTool.
    - ii. The Program and Terrestrial Chairs have reviewed all of the other symposia and accepted them into ConfTool.
  - b. Rooms and capacities should already be entered into ConfTool (this can be done as soon as your blank site is ready).
    - i. You can do this once you get the information from the hotel. Be sure and use the same names the hotel does – this will relate to the room map later on, and to the printed schedule. You can also enter in special data for that room if needed. For example: scheduling limitations due to evening events that are either in the same room or which everyone needs to be able to attend (such as the Business Meeting), webcasts in that room, etc.
  - c. Time blocks for each day should already be entered into ConfTool.
    - i. You can do this as soon as Harald creates your blank slate.
    - ii. Ensure that none overlap on the same day.
  - d. All other events have been entered into ConfTool, by their respective “chairs”.

- i. social events
  - ii. committee meetings
  - iii. tours
  - iv. workshops
  - v. roundtable luncheons
2. How to organize General Sessions (during the scheduling party)
    - a. “Accept” papers in ConfTool
    - b. Working as a group, divide paper submissions into themes or topics. This is a process that takes several hours, and is essentially both a brainstorming activity (which should involve more than one person) as well as a ConfTool activity.
      - i. As SHA moves toward better integration of terrestrial and underwater research, please avoid lumping papers together simply because they are on land or under water. For example, a paper on the sunken city of Port Royal likely would fit better in a session on Colonial Archaeology or Disaster Site Formation than in a General Underwater session just because the site happens to be in a submerged environment.
    - c. After you choose the session names, create them in ConfTool (see attached instructions; this is the same process as that used for Creating Organized Symposia, only you do not have to submit a proposal to do it).
    - d. Then assign papers to each session.
      - i. Got to "results of the reviewing procedure". Filter for the session number you want to add papers to. The papers you've assigned to this session will appear. See the status on the right – the ones which are on hold are not assigned are listed. Once you “accept” them you can then select the session number to assign them to.
  3. How to assign Organized Symposia and General Sessions to time slots and rooms
    - a. This is a three-person process, with all three people going “back and forth” for each session, simply going down the list of symposia one by one. The people working in ConfTool need to have a couple of windows on their computers open throughout the process.
    - b. Create a spreadsheet (with ConfTool export) listing all accepted symposia. It is useful to organize these thematically so that you can avoid thematic double booking.
    - c. One person works with this spreadsheet, moving from session to session in the spreadsheet, calling out each session name.
    - d. Another person works in ConfTool as this is happening, using one screen in “submissions” to search on each session as it come up, and another to search each proposal for author comments and participant lists for special requests. Note that discussants are not listed in the participant listing, but higher up in the form.
      - i. Everyone considers the timing of sessions with respect to several issues: keywords, thematic conflicts, sessions which need a larger room for whatever reason (big-name participants, important topics, etc), requests submitted in symposium proposals (and via email requests to you – there will be a lot of these)...etc.
    - e. Another person also works in ConfTool and actually assigns the sessions to rooms and time slots (which have already been entered into ConfTool). This person also checks for timing conflicts in ConfTool *as things proceed*. In 2011, this person was Michael Ashley.
  4. Create Poster Sessions
    - a. “Accept” all posters that you wish to accept.
    - b. Create a poster session for each day you will have posters

- c. Go to "conference program scheduling" and "results of the reviewing procedure". Filter for posters, find the one you want to enter (put the person's name in the search box). The box all the way to the right under the column "session/forum" will give you the poster sessions that are available to assign the poster to.
5. Decide on Sponsored and Invited Symposia
  - a. "Sponsors" is an optional field that is filled out by the symposium organizer. If a session is sponsored it needs to be listed as such in the program. You can indicate this in ConfTool drop-down menu.
  - b. Invited symposia can be created ahead of time and organized by the committee, or you can ask certain sessions if they wish to have "invited" status. They can be indicated as "invited" in the ConfTool "status" drop-down menu.
6. At the end of this "party" you should have the schedule laid out and all the basic conflicts checked. Be sure to allow time for subsequently organizing and creating the hardcopy of the Preliminary Program for publication in the *SHA Newsletter*. Make sure you consult with the *Newsletter* Editor regarding publication deadlines, and allow sufficient time for this stage.

### **G. Assigning Chairs in ConfTool: for Organized Symposia and for General Sessions**

1. For planned symposia, this can be done as soon as a submission track is created. It will give symposium chairs the access they need to monitor their submissions.
  - a. Go into ConfTool to do this, and then once it is done you can ask the chairs/organizers to check their submissions for accuracy themselves (though you will need to check it too).
  - b. Tell everyone who submits a symposium abstract that it *will not be accepted until it is correct*.
  - c. Some chairs may have to add or remove papers, create discussion segments, introductions, etc. in order to make the time blocks work.
  - d. *There is likely to be some resistance to the fixed session times*, so you will need to tell everyone this as early and often as possible, including the Call for Papers.
2. For general sessions, this can be done after the scheduling party because you will need time to recruit them.
  - a. In 2011 this was done by the Underwater and Terrestrial Chairs, respectively, who asked people who were participants in each type of session to volunteer for this chore.
  - b. Because these chairs are volunteers, there needs to be a thorough discussion with them ahead of time on how to handle problems during the sessions (for example, papers running over time).

### **H. An Alternative Suggestion: Producing Program and Signage from *within* ConfTool**

If you choose, you can cut/paste/format the actual schedule, and the room signage, using ConfTool *only*. It will not have individual paper timings – although you could add those manually if you wish, and this would not take much time if you have standard session lengths. Producing this sort of document is both easier and less time-consuming. Here are the steps:

1. Print out daily *schedules* directly from ConfTool. *Experiment* – for example, just click on a day and it will produce a list for just that day, in either list or table format. This is how the "Schedule at a Glance" can be produced.
2. Print out individual *sessions* from ConfTool – it takes less than 30 seconds to do each one, printing straight from ConfTool, and maybe a minute more if you prefer to cut/paste/print it

with Word. The papers would be listed in the order they are scheduled. You can include abstracts too if you wish.

- a. Note that printing them from the “Edit Schedule” screen will give you a numbered paper order, whereas printing them from the “Browse Schedule” screen will not. Experiment to see what you prefer.
3. Then you can then assemble everything in a bound volume, or use it for signs, or whatever.
  - a. If you did this, it is true that the individual time frames for each paper would be missing - e.g., 8:00-8:15, etc.
    - i. A key or a chart can be provided for each session "type".
    - ii. Or, the times can be added in MANUALLY to each session listing. Doing this means that you have to work within Word, not just do straight printouts from ConfTool.
4. This way of producing documents makes the responsibility for "dirty data" clearer - if people enter it in wrong, and don't check it when you ask them to, it will BE wrong in the schedule and on the sign. This would shift some of that responsibility back to each participant to take care of their own entries properly.
5. Michael Ashley is working the Technology Committee on alternative, electronic output from the ConfTool system, including live links to an iPhone/iPad or other mobile platform. It is possible to reformat the output from ConfTool to other styles and fonts, should this be of interest to your committee.