



ASME

SETTING THE STANDARD

Overview of the New Process for Technical Conference Planning

Moderators

Elio Manes and Burt Dicht

Representing Conference Planning Committee

Vikas Prakash, Mindy H. Grinnan, and Hamid R. Hamidzadeh

Q&A INSTRUCTIONS FOR ATTENDEES

You have the ability to submit your questions electronically to the moderator via the Q&A feature in the Web conference. To do so:

1. Click on the "Q&A" button at the top of the Live Meeting window.
2. Type your question. If you have more than one question, continue to type the additional questions on the same line.
3. When you are done typing all your question(s), hit the enter key on your keyboard or click on "Ask" to submit your question.
4. To add or edit your question(s), click on "Edit," make the changes and click on "Ask" to resubmit.

We will have time at the end of the webinar to answer a limited number of questions. If your question(s) is not answered, please send an email to Brandy Smith at smithb@asme.org and we will get it answered for you in a timely manner.

A copy of this presentation will be sent to all registered webinar participants.

CONFERENCE PLANNING COMMITTEE (CPC) MISSION STATEMENT

The CPC is to maintain and improve the high quality of all technical conferences for the dissemination of knowledge. The Committee is to provide training and support for the organizers, to assess the technical and financial successes of these events, and to grant their approval.

CPC TASKS

- Develop:** training materials and data base of best-practices for conference organizers;
- Train:** future conference organizers and provide training sessions;
- Support:** conference Organizers with managing logistics, and developing budget and planning;
- Insure:** compliance with ASME conference calendar;
- Promote:** development of interdisciplinary conferences and revenue sharing among Groups, Divisions, Institutes, and Technical Committees;
- Approve:** conference dates, budgets, and publication strategy based on the ASME guidelines;
- Assess:** establish a set of technical and management outcomes to ensure and monitor success of conferences; and
- Coordinate:** efforts with Board on Technical Knowledge Dissemination (BTKD) and collaborate with Technical Groups, Strategic Planning Committee, publication Committee, and ultimately report to BTKD.

NEW CONFERENCE APPROVAL FORMS

CA-1 Form: used for ASME owned or led conferences

CA-2 Form: Used when ASME is a participating society and has no financial responsibility. Also, due to potential legal liabilities, the name ASME (or the name of its associated division/technical Committee) should not appear in the title of the conference.

KEY FEATURES OF NEW CA-1/CA-2 FORMS

- Improved execution process (quicker to get on calendar)
- Improved activity reporting to enable a “Lessons Learned” resources
- Memorandums of Understanding (MOU) to document agreements
- 3-year planning cycle (if possible) and schedule of proposed dates and times for each activity
- Updated Events Management and Web Tool guidance

CRITERIA FOR USING THE CA-1 FORM

If one or more of the criteria below apply to your conference you must use the CA-1 Form:

- ASME and/or your division have any level of financial responsibility.
- Your division is the sole organizer of the conference
- The conference is a joint activity between your division and other ASME divisions or units. Only one CA-1 is required. (The lead division, as per agreement, is required to file the CA-1)
- The conference is a joint activity between your division and an outside organization(s) and your division is **financially** involved
- The name ASME (or the **name of its associated division/technical Committee**) appears anywhere in the title of the conference, regardless of your division's level of involvement or partnership with any other unit or organization (i.e., even if ASME or your division has no financial responsibility)

NEW CA-1 FORM

- CA-1 Part 1 of 3 should be signed and submitted by the Conference Chair to ASME Staff for processing with CPC and to secure conference dates. Part 1 must be approved by CPC prior to establishing any Conference Websites
- CA-1 Part 2 of 3 should be submitted by the Conference Chair to the ASME Staff for processing with CPC prior to any contracts being signed
- CA-1 Part 3 of 3 should be submitted by the Conference Advisor to the CPC no later than four months after completion of the Conference

CA -1 PART 1 OF 3

Requirement:

- CA-1 Part 1 must be approved in advance of establishing any conference websites and to tentatively secure conference date(s).

Purpose:

- Part 1 provides the CPC with key event information enabling the CPC to ensure that your conference venue(s) and date(s) do not conflict with other ASME conferences.
- Once Part 1 is approved, the CPC has given the authorization for the development of a conference website, negotiation of contracts, and for the conference to be listed in the ASME calendar of events. Furthermore, the CPC will assign a seasoned conference advisor, in addition to your already selected conference advisors, to assist you with the CPC requirements.

CA -1 PART 1 OF 3 CONTINUED

Information Needed to fill out Part 1:

- Confirmed location/venue or potential locations under consideration.
- Expected attendance
- Any known similar conferences or potential conflicts with other ASME conferences
- Anticipated use of ASME Services (Web Tool, Conference Proceedings, Events Management, etc.)

CA -1 PART 2 OF 3

Requirement:

CA-1 Form, Part 2, must be approved in advance of signing any hotel, food or other conference contracts

Purpose:

- Part 2 provides the CPC with key event business and budget information enabling the CPC to determine if your conference is being planned in such a way that it ensures the success of the conference from both a program and financial perspective.
- Once Part 2 is approved, the CPC has given the authorization for the contracts to be signed.

CA -1 PART 2 OF 3 CONTINUED

Information Needed to Fill Out Part 2:

- Business Plan (if this is a new conference)
- Finalized event details (Date, Venue, Use of ASME Services, Financial Responsibilities, Exhibit Plans, etc.)
- Any applicable MOUs (required for Part 2)
- Financial Details
 - Includes attendance, expenses, revenue, surplus/deficit and disbursements to custodial and general fund for the previous two conferences
 - Includes anticipated attendance, expenses, revenue, surplus/deficit and disbursements to custodial and general funds for the planned conference
 - Includes the submittal of a detailed proposed budget for the planned conference

CA -1 PART 3 OF 3

Purpose:

- Part 3 provides the CPC with an ability to gauge the success of the conference and to build a library of “best practices” and “lessons learned” for future conference organizers.

Requirement:

- CA-1 Form, Part 3, must be submitted no more than 120 days following the close of the conference.
- This Form will be completed by the Conference Chair in collaboration with the Assigned Conference Advisor.
- Failure to submit Part 3 will prevent approval of any future conferences.

Information Needed to Fill Out Part 3

- Final program (number of sessions, speakers), attendance and budget
- Answer all 10 questions providing assessment of your conference

LEGAL CONTRACTS & MOU's

Contracts

All contracts with outside agencies, venues, vendors, third parties, etc., must have approval of ASME Headquarters.

Memorandum of Understanding

The memorandum of understanding between the originating unit Staff, Internal ASME unit, Cosponsor, and Outside unit where ASME has no financial responsibility

Approval

All contracts and MOUs must be reviewed and agreed to by ASME's legal staff. These documents are not valid unless signed by the ASME Assistant Treasurer and the ASME Executive Director (or Deputy Executive Director).

WHERE TO FIND FORMS & TEMPLATES

Online Unit Leadership Resource Center

<http://volunteer.asme.org/unit/>

Calendar Of Events

- ASME Boiler and Pressure Vessel Committee Code Week: August 10 to 14, 2009
- A17 TGs on Use of Elevators by Firefighters and Occupant Egress
- A17 Elevator Code Week: September 2009

Get More >>>

Find Your Event



If you had the "Local Leadership Toolbox" bookmarked please make sure you update it with our new Unit Leadership URL <http://volunteer.asme.org/unit>

For assistance please contact Unit Support via unitsupport@asme.org or phone 212-591-7006.

Volunteer E-Request Tool (VERT)

The Volunteer E-Request tool is designed to serve as a centralized portal for answering your unit administrative questions, making inquiries or requesting staff assistance.

Instructions: Volunteer E-Request Tool (VERT)

A step-by-step guide on how to use the Volunteer E-Request Tool (VERT).

ASME Events Management Department

ASME has an internal Events Management (Conference/Meeting Planning) Department, located at its corporate headquarters in New York City.



Unit Forms & Instructions

Forms and instructions used by ASME unit leadership to maintain their society units, such as expense reports, unit activity reports, merit funding and unit operation budget information.

Online Unit Roster

Leaders can find their unit's member contact information, code officers, send email to the unit and download membership rosters.



ASME Financial Reports Manager

The ASME Financial Reports Manager provides Unit Chairs and Treasurers access to their custodial accounts.

Technical Conference and Event Guidelines

Guidelines and information on how to plan an ASME technical conference or event



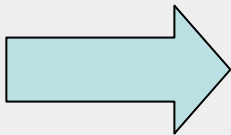
Unit Manuals, Guides, Handbooks & Policies

The list of manuals and policies that apply to ASME's Sections and Student Sections.



Unit Leadership Resources

A collection of power points, white papers, instructions and links that will assist ASME Unit leaders.



Calendar Of Events

- ASME Boiler and Pressure Vessel Committee Code Week: August 10 to 14, 2009
- A17 TGs on Use of Elevators by Firefighters and Occupant Egress
- A17 Elevator Code Week: September 2009

[Get More >>>](#)



Technical Conference and Event Guidelines

The purpose of these guidelines is to provide a process for any ASME Knowledge and Community Sector unit to organize an ASME Conference or Event. All K&C units intending to run or participate in ASME sponsored conferences or events must comply with schedules and approval requirements contained herein.

Please find the full set of guidelines below, along with corresponding appendices.

- [Conference Guidelines \(.pdf\)](#)
- **Appendices**
 - [Conference Approval Form \(CA-1 Form\) – Appendix I-A](#)
 - [CA-1 Form, Part 1 of 3 \(.doc\)](#)
 - [CA-1 Form, Part 2 of 3 \(.doc\)](#)
 - [CA-1 Form, Part 3 of 3 \(.doc\)](#)
 - [Conference Approval Form \(CA-2 Form\) – Appendix I-B \(.doc\)](#)
 - [Conference Planning Checklist / Timeline – Appendix II \(.pdf\)](#)
 - [Technical Program Brief – Appendix III-A \(.pdf\)](#)
 - [Preliminary Budget – Short Form – Appendix III-B \(.pdf\)](#)
 - [Business Plan – Appendix IV \(.pdf\)](#)
 - [Memorandum of Understanding – Internal – Appendix V-A \(.pdf\)](#)
 - [Memorandum of Understanding – External – Appendix V-B \(.pdf\)](#)
 - [Sample Awards Banquet Program - Appendix VI \(.pdf\)](#)
 - [Conference Success Measures & Definitions – Appendix VII \(.pdf\)](#)
 - [Toolbox / Website Request Form – Appendix VIII \(.doc\)](#)
 - [Exhibitor Agreement – Appendix IX \(.pdf\)](#)
 - [Budget Template – Appendix X \(.xls\)](#)
 - [Printed Program Guidelines – Appendix XI \(.pdf\)](#)
 - [Activity Report Template – Appendix XII \(.pdf\)](#)

CONTACTS

Have questions? Contact Customer Service at:
 E-mail: infocentral@asme.org
 Phone: 1-800-843-2763
 or 1-973-882-1170
 Mexico: 001-800-843-2763 Fax: 1-973-882-1717

CONFERENCE APPROVAL PROCESS

The request for approval requires submittal of the appropriate conference form by the Conference Chair and the approval by following units (or their designee) and staff:

- The Conference Chair or Lead Organizer
- The initiating unit's Executive Committee Chair
- The unit's oversight board – Technical Group Leader (or District Leader, when appropriate)
- Assigned staff manager (Events or K&C)
- Director of the Events Management
- Managing Director of K&C
- Managing Director of Publications
- Legal Staff, as necessary
- Chair of the Conferences Planning Committee

SUGGESTED CONFERENCE PLANNING CHECKLIST AND TIMELINE

| Before Conference | Responsibility |
|-------------------|---|
| 36 months | ♦ Initiating unit selects Chair |
| 33 months | ♦ Conference leadership personnel and roles established ♦ ASME Staff Manager assigned ♦ Potential site demographics requested (including local liaison contact) |
| 30 months | ♦ Submit draft CA-1/ Part 1 of 3 with tentative expected dates for the event. ♦ Upon approval of CA-1, your dates are secured and a Conference Advisor will be assigned by the Conference Committee ♦ Complete Memorandum of Understanding with Staff ♦ Consider partnerships – ASME units and other Societies |
| 27 months | ♦ Site Selection (include hotel or other venue) ♦ Confirm availability of date options with ASME Conferences Committee and hotel and or other venues |
| 24 Months | ♦ Submit CA-1/Part 2 of 3 with Business Plan and Final Budget (includes program layout); set fees ♦ Hotel and/or other venue dates and selection (contract only after CA-1/Part 2 of 3 approval), terms and conditions, legal – include exhibits as applicable ♦ Local liaison become member of planning committee; ♦ Addendum to Memorandum of Understanding ♦ Solicit sponsors (if applicable) |
| 18 months | ♦ Complete web tool request forms for set-up ♦ Consider Professional Development program |
| 16 months | ♦ Calls for papers prepared and submitted – web, news, etc ♦ List of potential tours and/or other events |
| 12 months | ♦ Paper abstracts due ♦ Consider invited speakers ♦ Review program and budget for any adjustments ♦ Review hotel or other venue terms and conditions ♦ Exhibit review (if applicable) – sales, candidates ♦ Confirm Professional Development program (if applicable) |
| 11 months | ♦ Site visit (if planned) ♦ Review and approve abstracts ♦ Resolve final publications plan and cost ♦ Solicit meeting requests |
| 9 months | ♦ Initial publicity ♦ Confirm tours and other events ♦ Confirm sponsors (if applicable) |
| 8 months | ♦ Paper submissions due (with author registration) ♦ Format program information |
| 6 months | ♦ Review and approve papers ♦ Second round of publicity ♦ Confirm meeting requests ♦ Monitor registration – conference and hotel |
| 4 months | ♦ Final papers due (with resolved comments) ♦ Program layout and presentations - FINAL |
| 3 months | ♦ Printed Program |
| 2 months | ♦ On-site preparations complete |
| Post Conference | Responsibility |
| 1 month | ♦ Registration reports, including an attendance list with contact information |
| 3 months | ♦ Financial and activity reports due – staff (as appropriate) and Conference/Event Chair |
| 4 months | ♦ Final Report by the Conference Chair and completion of the CA-1 Part 3 of 3 report by the Conference Advisor |

CPC MEMBERS

The membership on the CPC includes a leading group of seasoned advisors representing all Technical Groups:

Hamid R. Hamidzadeh, Chair: hhamidzadeh@tnstate.edu

William Bees, PTTG: beesw@asme.org

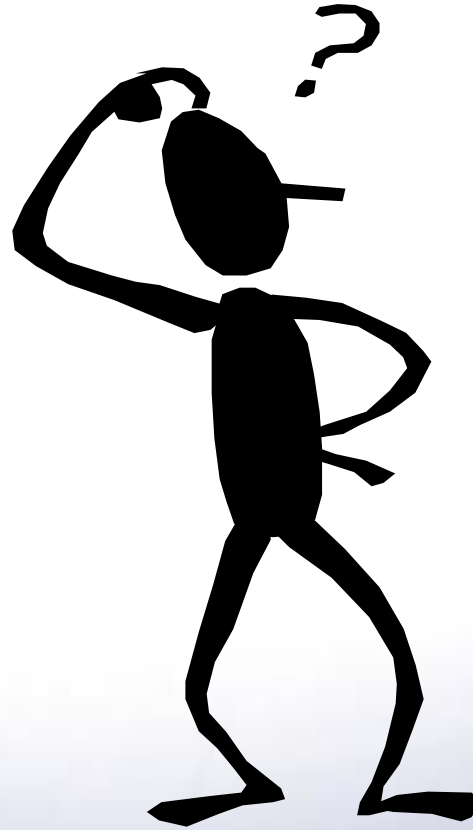
John Roth, MTG: jtr11@psu.edu

Greg Kowalski, SDTG: kowal@coe.neu.edu

Vikas Prakash, BETG: vikas.prakash@case.edu

Douglas Reed, ECTG: douglas.d.reed@dom.com

Thank you for your attention!



Q&A INSTRUCTIONS FOR ATTENDEES

You have the ability to submit your questions electronically to the moderator via the Q&A option in the Web conference. To do so:

1. Click on the "Q&A" button at the top of the Live Meeting window.
2. Type your question. If you have more than one question, continue to type the additional questions on the same line.
3. When you are done typing all your question(s), hit the enter key on your keyboard or click on "Ask" to submit your question.
4. To add or edit your question(s), click on "Edit," make the changes and click on "Ask" to resubmit.

We will have time at the end of the webinar to answer a limited number of questions. If your question(s) is not answered, please send an email to Brandy Smith at smithb@asme.org and we will get it answered for you in a timely manner.

Thank you and we hope you found the webinar informative!