

# The World History Association Conference Manual

## *Procedures, Planning, and Recommendations*

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### I. WHA Conference Organizers

#### **Conferences Committee**

The Conferences Committee is responsible for selecting conference sites (hosts), themes, and dates, as well as providing assistance with seeking sponsorships, the recruitment of participants, and general promotion of the event. It must at all times work in close concert with the Program Committee, the Secretariat, and the Local Arrangements Committee.

#### **Membership:**

Four to five WHA members (previous conference-planning experience is important), supervised by a chair, all of whom have been appointed by the WHA President. The members serve three year terms. Terms are renewable.

#### **Duties:**

*A. Conference site selection* Ideally, this should be done **at least two years in advance**. Even longer-term planning helps the WHA attract greater numbers of attendees, both among foreign participants in the U.S. conferences and U.S. attendees at the overseas conferences. Ideally, a member of the Committee should visit each future or potential site to gain a first-hand knowledge of the locale and to coordinate directly with the Local Arrangements Committee.

- a. Traditionally, the WHA annual meeting is held two years out of three in the United States, with the third year in another country. A suitable host institution in an attractive setting is most important, but convenience of transportation, regional variety, and the strength of the Local Arrangements Committee (LAC) are necessary criteria, as well.
- b. In its initial contact with a potential host, the Conferences Committee, in concert with the WHA President and Secretariat, conveys as clearly as possible the various necessary elements provided by the host institution. These include:
  - i. Free rooms and infrastructural support (e.g. security) for panels/plenary sessions, meetings, receptions/luncheons, the book exhibit, a teachers' workshop, and similar activities
  - ii. Free Audio-Visual support
  - iii. Drayage (i.e., the shipping, receiving, and storage of books for the book exhibit)
  - iv. Accommodations (nearby hotel/s, and, if available, dormitory rooms) and a special conference rate for conferees staying there
  - v. Parking

- vi. Publicity materials for the WHA website
- vii. Printing of the conference Program (payable by the WHA)
- viii. Food and Beverage Services (receptions, lunch/banquet, coffee breaks) (paid by the WHA and its sponsors)
- ix. Sponsorships (for receptions, banquets, breaks, workshops, speakers, or other events)
- x. Volunteers and local labor for registration/check-in, book exhibit set-up, panel minding, technical assistance
- xi. Transportation planning assistance
- xii. Assembly of registration bags and registration supplies
- xiii. Billing arrangements (for on-site costs, including room reservations, housing, printing, and so on)
- c. The site selection must be approved, by majority vote of the WHA Executive Council, preferably no later than two years preceding the conference.
- d. The Chair of the Conferences Committee, in concert with the WHA President, must secure a “Memorandum of Understanding” from the host institution. The more details that are spelled out in this document, the better.

*B. Dates selection*

- a. Summer, preferably late June/early July.
  - i. The last weekend in June (Thursday afternoon to Sunday noon) has traditionally been chosen because it avoids a possible conflict with the teaching duties of WHA members.
- b. Date selection is also contingent on local conditions.
- c. The final decision on dates is made jointly by the Conferences Committee, the Local Arrangements Committee, the Program Committee, and the Executive Director.

*C. Theme(s) selection*

- a. In concert and consultation with the Program Committee and the LAC, the Conferences Committee will choose one or two themes for the conference.
- b. Factors influencing its choices include such considerations as: the geographic location of the conference; timing (a special event or anniversary year); contemporary events; the wish to attract to members of other historical associations or specific groups within the WHA membership; and general marketability/appeal.
- c. Keynote speaker selection is done by the Program Committee in consultation with the Conferences Committee and LAC.

*D. Fundraising*

- a. In concert with the WHA Secretariat and the LAC, the Conferences Committee works to find conference sponsors and other funding.
- b. Sponsored events include coffee breaks, luncheon, banquet, receptions, and keynote presentations, conference bags, prizes, a teachers' workshop, specific panels, or any other element of the meeting.
- c. The WHA Secretariat decides the minimum amount for any patronage.

*E. Recruitment and Promotion*

- a. In concert with the WHA Secretariat and LAC, the Conferences Committee assists with the promotion of the conference.

Program Committee Responsible for selecting and communicating with keynote speakers; preparing and posting the Call for Papers; screening, sorting, and organizing paper and panel proposals into appropriate panels; arranging room assignments and A/V equipment requests in concert with the Local Arrangements Committee (LAC); and notifying applicants of the acceptance and scheduling of their papers/panels. A subcommittee of the Program Committee may be set up to organize a “teachers workshop” that runs prior to or concomitant with the conference.

**1. Membership**

Three to four WHA members (previous conference-planning experience is important) appointed by the WHA President and supervised by a Chair. The Chair oversees programmatic and related administrative issues and must be willing to work closely and constructively with local arrangements chair(s), the WHA Secretariat, and the Conferences Committee. Members serve three-year terms. Terms are renewable.

**2. Duties**

*A. Select conference themes in concert with the Conferences Committee*

*B. Select and contact Keynote Speakers*

- a. Select two speakers in consultation with the Conferences Committee and the Secretariat. Keynote speakers are subject to approval by the Executive Council. . b. Preference should be given to at least one local (from conference city/area/state) speaker..
- c. No more than one speaker from abroad should be featured due to prohibitive travel costs.
- d. Responsibility for contacting the keynoters lies with the Chair of the Program Committee, but it may be delegated to either the Chair of the Conferences Committee, or the WHA Executive Director. e. Once the keynoters have accepted, either the Committee Chair or the WHA Secretariat must confirm the honorarium (if any) and travel/lodging allowances. ===== Some keynoters have chosen to waive the honorarium and even travel expenses for the benefit of the WHA.
- i. Note: the keynoters who reside in the USA will receive a Form-1099 at tax time. They must supply their Social Security number for this purpose.

- f. As far in advance as possible, the Program Committee Chair should obtain the titles of the keynoters' talks so that they can be listed in the Preliminary Conference Program and in periodic conference publicity. This information should also be conveyed to the WHA Secretariat.
- g. At least six weeks prior to the conference, the Program Committee Chair and/or WHA Executive Director should finalize the titles of the keynoters' talks to allow time for this information to be included in the printed Conference Program.

*C. Draft and disseminate the Call for Papers (CFP)*

- a. Nine to twelve months in advance of the conference, the Program Committee in concert with the WHA Secretariat should draw up the CFP and post it on the WHA website, in the *World History Bulletin*, on H-World, AP World History listserv, the AHA website, and other appropriate venues.
- b. Paper and panel proposals should be submitted electronically, if at all possible, to the WHA Secretariat in Hawai'i.
- c. Proposals must indicate whether or not the applicant is a current WHA member.
- d. **Proposals must indicate audiovisual equipment requests**
- e. Applicants should provide both an e-mail address and a postal address, in the event that the WHA is unable to reach them electronically..

*D. Audio-visual equipment requests*

- a. All applicants must indicate their A/V equipment requests at the time they submit their initial paper/panel proposals. This caution must be part of the Call for Papers..
- b. After gathering all the AV requests, the Program Committee should:
  - i. confirm these requests in its letters of acceptance to panelists (and ask participants to consider bringing their own equipment)
  - ii. submit the list of equipment requests to the Local Arrangements Committee
  - iii. One person from the Program Committee (usually the Chair) should follow up with the LAC to make sure that the equipment is reserved and determine tech support arrangements.

*E. Compile, organize, and evaluate the paper and panel proposals as they come in.*

- a.

*F. Screen submissions and arrange accepted papers into appropriate panels*

- a. Selection guidelines
  - iv. No individual may appear on more than two panels at a single WHA conference. All members of panels must be registered and have paid all required fees for the conference by April 15 to be included in the program.



*e. Other issues and concerns*

- a. The Secretariat and the Conferences Committee, in concert with the Program Committee, should also consider ways by which to subsidize the travel costs of needy panelists from outside the USA. This is important for conferences both within and outside of North America. The World Scholar Travel Fund has been established for this purpose, but annual requests far outweigh available funds. Until more funds become available, no recipient should receive more than \$1000 total in support, including a waived conference registration fee.

## **A. Teachers' Workshop Subcommittee**

Early on in the selection of conference site, dates, and themes, the Conferences Committee and Program Committee should determine whether they wish to include an official WHA Teachers' Workshop in that year's annual meeting. This could be scheduled just before or after the conference takes place or integrated into the fabric of the conference itself.

### **1. Membership**

A. It is logical for the Teaching Committee to be the driving force behind an annual workshop at the conference. Should that committee choose not to do so, the Teachers' Workshop Subcommittee may be comprised of Program Committee and Conferences Committee members, the Local Arrangements Committee, and/or others.

B. C. In Atlanta in 2003, the Teachers' Workshop was the product of the volunteer initiative of the local hosts and the Southeast World History Association affiliate (SEWHA). The Program Committee had little to do with it. In Long Beach in 2006 and Milwaukee in 2007, the Teachers' Workshop was conceived and put together by members of the local arrangements committee in concert with College Board. In brief, , circumstances will vary from host site to host site.

### **2. Funding and scheduling issues**

A. Workshop funding may be obtained from the host site's School of Education, if it has one, or other sources. Such workshops can be useful in attracting area teachers who might not otherwise attend the conference.

## **B. Local Arrangements Committee (LAC)**

Responsible for arrangements at the conference site, including booking rooms and equipment; organizing food service; setting up lodging (hotel/dormitories); helping with logistics for the book exhibit; arranging for the printing of the Program; seeking institutional and/or local conference sponsorship; local conference promotion; and securing lodging and travel discounts where possible. The local hosts may also collaborate with the WHA Secretariat and the Program Committee to set up a teachers' workshop at the conference.

## 1. Membership

Three to six people, representing the host institution and the regional WHA affiliate (when the latter is involved), supervised by one or two Chairs, who will oversee local planning and serve as liaison to the chairs of the Conferences and Program Committees, and the WHA Executive Director.

Normally, the Chair is held by a faculty member at the host institution, but preference should go to the most competent (and willing) individual. Because clear and consistent communication between the Local Arrangements Committee and the WHA Secretariat is vital to the conference's success, the host must appoint individual(s) capable of the significant responsibilities involved, as well as a local Chair who can correspond effectively, mostly via email, with the Secretariat.

## 2. Duties

### A. *Secure local funding*

- a. In concert with the Conferences Committee and WHA Secretariat, the LA C will work to find sponsors and other funding for the conference..
- b. Sponsored events may include:
  - i. Coffee/beverage breaks
  - ii. Luncheon
  - iii. Banquet
  - iv. Receptions
  - v. Teaching or other workshops and/or panel sessions
  - vi. Keynote or other presentations
  - vii. Additional events (if any, such as a graduate student reception, film festival, etc.)

**The WHA Secretariat is solely responsible for setting for setting all fees associated with the conference, including the minimum amount for a particular sponsorship.**

### B. *Reserve Rooms*

- a. Ten to twelve meeting rooms, including tables and chairs, 30-50 person capacity, for the three days (Friday-Sunday) of the conference
- b. Space for a teachers' workshop of 30-75 people, if applicable
- c. Lobby space for breaks
- d. A securable room for WHA materials.
- e. Registration desk/check-in area (Thursday-Sunday)
- f. Executive Council Meeting Room (Thursday afternoon)
- g. Auditorium for daily plenary sessions (minimum 200 people)
- h. Reception space
- i. Luncheon/banquet space (if required)

- j. Refreshment space, preferably located at or close to the book exhibition area.
- k. Book exhibition space
  - i. Securable space for 35-45 tables; plus tables, tablecloths/bunting, chairs, wastebaskets, electrical outlets, and internet access (if available)
  - ii. For more on book exhibit space requirements, see below under E: WHA Secretariat, c: Book Exhibit)

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*C. Arrange drayage (the shipping, receiving, and storage of books) for the book exhibit*

- a. Identify and reserve storage space for the week before and day after the conference
- b. Arrange labor for assisting with the receiving and moving of book boxes
- c. Together with the WHA Secretariat, determine the optimal dates for receipt of books prior to conference.
- d. Help determine available shipping arrangements.
- e. Arrange security (locked room, security guards?) for the book exhibit space after hours
- f. Drayage arrangements need to be finalized and conveyed to the WHA Secretariat as early as possible (2-3 months in advance of the conference), so that it can be conveyed to the book exhibitors.
- g. Arrange return of exhibitors' materials (at their expense).

*D. Arrange accommodations and parking*

- a. Organize hotel and dormitory rooms (if available)
- b. Secure discounted rates if available
- c. If a campus dormitory is available, work with the campus housing office to set up payment, check-in, and registration
- d. Organize on-campus parking, if applicable, and work with campus parking office to set up check-in and registration
- e. Organize separate parking arrangements for those individuals staying in the dormitory, if relevant

*E. Arrange food and beverage services*

- a. The WHA Secretariat will work with the LAC and Program Committee to determine a catering schedule.
- b. The Local Arrangements Committee will coordinate with the local campus food services/catering office or off campus catering service.
- c. The following food and beverage service is recommended:
  - i. All panels, plenary sessions, workshops and the business meeting require water for the speakers.
  - ii. Executive Council meeting: water, coffee, tea, possibly juice or soft drink.
  - iii. Conference receptions (one is ideally sponsored by local host): hors d'oeuvres, drinks
    - 1. Check to see if there are special considerations/restrictions on serving alcoholic beverages on campus
  - iv. Luncheon: if available at a reasonable price on campus. Buffet or box lunch otherwise.
  - v. Coffee and tea breaks: one or two per day Friday through Sunday, possibly with pastries
  - vi. Banquet: If desired, ideally held on campus or nearby.
- d. Costs:
  - i. WHA Secretariat (registration fees) and sponsors pay for all food and beverage services, although traditionally the host has funded a conference reception.. Luncheon and the (rarely held) banquet are normally paid for separately by the conferees, but some hosts and other sponsors (e.g. Ifrane, Long Beach, Marquette, and San Diego) have provided one or the other at no charge to conferees.

*F. Coordinate audio-visual equipment with the Program Committee*

- a. Determine the availability of audio-visual support. Full audio-visual support should be provided free of charge by the host. Make reservations as necessary.
  - i. A/V equipment may include overhead projectors, screens, LCD projectors, video projectors, and more
- b. Coordinate the scheduling and types of equipment needed with the Program Committee
- c. Reserve the equipment with the appropriate building/campus officials
- d. Research availability of Internet access for book exhibitors, panelists, and general conference participants, and make appropriate arrangements
- e. Secure the assistance of a technical support person(s) for the dates of the conference. This is necessary to be sure that the equipment is unlocked and usable.

- f. Inform the WHA Secretariat well in advance of the costs for equipment use and technical support. As noted above, the expectation is that all A/V support is provided gratis.
- g. Organize volunteer assistance for the panel sessions using tech support

*G. Research and arrange transportation logistics*

- a. The Local Arrangements Committee's assistance is vital in providing local travel information.
- b. Information is needed on air and ground transportation (train, car, bus, local mass transit, walking)
  - i. This information should be provided as far in advance of the conference as possible
  - ii. The LAC should forward such information to the WHA Secretariat for posting on the WHA's website and for inclusion in the *World History Bulletin*
- c. Will local mass transit be available to and from the conference site and the hotel/dormitories? If so, this information should be posted on the conference website, included in the conference program, and enclosed in the Registration Packet
- d. Arrange shuttle service if necessary (i.e., the distances are too far to walk and no local mass transit is available)
  - i. Factors determining whether a shuttle is necessary include weather, distance between the hotel / dormitories and the conference venue, and safety. Some conference participants have limited mobility and will need transportation assistance
  - ii. The shuttle bus route and schedule should be forwarded to the WHA Secretariat and posted on the conference website well in advance of the conference dates.
  - iii. Shuttle service can be extremely expensive. In Atlanta in 2003, the campus shuttle bus cost nearly \$1,000. In Virginia in 2004, the shuttle was provided free by the conference hotel. Lack of shuttle service in 2006 at Long Beach proved a major problem for those without automobiles. In Salem in 2009, regular service between the college and downtown was provided free-of-charge by Salem State College. Either way, check carefully the price and conditions of your campus's Auxiliary Services. It may be cheaper to use an off-campus provider.
  - iv. Make sure that the shuttle schedule is clearly publicized. In Atlanta, bus service was provided for four hours in the morning and late afternoon. The route linked the dormitory, official hotel, and conference building. In Virginia, there was only one morning drop off and afternoon pickup. Those who missed the shuttle had a hard time finding alternate transportation to/from the hotel.
  - v.

*H. Identify and arrange a reasonably priced local printer for the conference Program*

- a. The program *must be printed locally* due to timing and shipping costs
- b. In concert with the WHA Secretariat, the LAC will identify and make arrangements with a local printer at least three (3) months in advance.
- c. The printed Program should be finished at least a week prior to the conference so that the LAC can include it in the registration packets. Remaining (extra) Programs should also be available at the conference site.
- d. The WHA pays for printing & layout costs and recruits program advertisements/announcements, but the LAC is encouraged to recruit local advertisers.
- e. Program content will be prepared by the Program Committee and WHA Secretariat. The LAC must supply room and other logistical information.
- f. A preliminary version of the program should be posted on the conference website at least two months in advance
- g.

*I. Recruit local volunteers*

- a. Local assistance will be needed for the following:
  - i. help with printing/folding/stuffing/sealing/mailing pre-conference announcements to campus and other regional addresses (WHA can provide addresses and assist with postal costs)
  - ii. panels rooms set up and breakdown during conference (“panel minders”)
  - iii. registration check-in Friday-Sunday
  - iv. assistance with book exhibit set up and breakdown
  - v. assistance with audio-visual equipment set up
  - vi. general information and errand-running during conference
- b. Based on past experience, a minimum of ten to fifteen volunteers for the three days of the conference is recommended
- c. Possible volunteers include graduate, undergraduate, faculty, staff, members of the regional affiliate, or others.
- d. Free conference admission should be given to volunteers who work a minimum number of hours.
- e. All volunteers are subject directly to the guidance of the WHA’s Administrative Assistant or her/his designated deputy.

*J. Promote the conference locally and beyond*

- a. Information about the conference should be publicized as widely as possible

- b. A short announcement should be posted several times in the months preceding the conference on:
  - i. H-World
  - ii. AP World History listserv
  - iii. Other relevant websites and listservs
- c. News of the conference should also be announced locally:
  - i. Host institution's website
  - ii. Host institution's newsletter
  - iii. Classroom announcements at the host institution
  - iv. Departmental flyers and posters
  - v. Local newspaper(s)
  - vi. Local chamber of commerce
  - vii. Flyers mailed to area schools, colleges, and universities
- d. The the LAC shuld also consider preparing and mailing a regional announcement about the conference. The WHA Secretariat can assist in the design of such promotional materials.

*K. Prepare registration materials for the conference bags*

- a. Conference bagss must include, at minimum, the printed Program, plus an insert announcing any late changes
- b. In addition, the conference bag will ideally include:
  - i. local maps, esp. those featuring downtown streets
  - ii. information on public transportation
  - iii. information on local sites of interest (museums, historical sites, walking tours, monuments, etc.)
  - iv. list of nearby things-to-do
  - v. list of local restaurants/bars
  - vi. information on internet access
  - vii. parking information
  - viii. discount coupons and other promotional materials
  - ix. a paper pad or note book and pen or pencil
  - x. local souvenirs provided by the Chamber of Commerce, the campus book store, or similar institutions.
  - xi. raffle-prize tickets for items donated by local merchants and institutions.
  - xii.
- c. .

- d. If available far enough in advance, some of these items could be included in the printed Program. Otherwise, they go in the conference bag.

*L. Assist at r registration/conference check-in*

- a. At the conference itself, the WHA will provide an on-site registration list containing a list of all registrants to date.
- b. The WHA will also provide cash for making change and credit card slips for registrants paying on-site
- c. The local host should also provide pens, pencils, stapler, sanitary hand cleaner, and other supplies as needed for the registration desk.

### **C. WHA Secretariat**

Acts as the liaison for all the committees mentioned above and is responsible for overall conference coordination, including making sure all the duties assigned above get done. Upon its arrival at the conference site, it is the final authority on all matters relating to the conference.

In addition, the WHA Secretariat has a special responsibility for collecting and compiling registration forms and fees, recruiting and organizing book exhibitors and program advertisers, helping coordinate catered events and audiovisual equipment, posting updates on the WHA website, coordinating billing and payment with the local host, overseeing on-site registration, and funding conference costs not covered by sponsors or the host institution.

#### **1. Staff**

Executive Director and Administrative Assistant

#### **2. Duties**

The WHA will create a conference web page

- a. The WHA will create a webpage containing information on the conference. This should be completed at the latest ten to nine months in advance of the conference.
- b. Proposal submissions and on-line registration will be organized by the WHA Secretariat on its website
- c. As soon as it is ready, the preliminary program will be posted on the the WHA website
- d. The conference website should include:
  - i. Registration information, including rate schedule and forms. (Detailed book exhibit and program advertising information.
  - ii. Preliminary conference program (should be available at least two full months before the conference)
  - iii. Information on teachers' workshop, if applicable
  - iv. Air and ground transportation information

1. By air—list official airline, if any, and note discount available
  2. By car—driving directions, including maps if available
  3. Campus parking info
  4. By bus
  5. By train
  6. Metro/other mass transit
  7. Taxis
  8. Conference shuttle (if any), including route map and schedule
- v. Accommodations information
1. rates, address, telephone number, and website of the conference hotel
  2. description of the dormitories (if applicable), including reservation information, prices, description of handicap/disability accessibility, and parking
- vi. Maps of conference site/campus (suitable for printing if available)
- vii. Contact information for questions about local arrangements
- viii. Acknowledgement of the conference sponsors
- e. Other possible items to include on the website:
- i. Brief information about the host institution and city with hot links to relevant websites
  - ii. Photographs of the host institution, city, region
  - iii. Local weather during the conference

#### A. *Registration*

- a. Set early-registration deadline, for which a discounted fee is offered..
- b. Determine rates based on estimated costs and desired profit margin. Decide on fee categories, i.e., members, non-members, students, etc. Decide whether there will be a day rate and set the policy for it.
- c. Decide whether fee will include a conference lunch/banquet.
- d. Design the registration form.
  - i. Post the form on the WHA website.
  - ii. Print announcement and form in the preceding Fall and Spring issues of the *World History Bulletin*

- iii. Do bulk mailings to announce the conference to WHA members.
- iii. Collect and track registration fees.
- e. Prepare registration rosters to be used at conference check-in, .
- f. Make name tags.
- g. At the conference itself, oversee the registration volunteers.

*B. Conference publicity*

- i. The following venues should be used: WHA website, *World History Bulletin*
- ii. WHA Executive Council listserv  
[WHAEXEC@LISTSERV.MUOHIO.EDU](mailto:WHAEXEC@LISTSERV.MUOHIO.EDU)
- iii. WHA Affiliates Blog [www.blogger.com](http://www.blogger.com) and affiliates' web sites.
- iv. *World History Connected E-Journal*  
<http://worldhistoryconnected.press.uiuc.edu/index.html>
- v. Conference host institution's website and other venues considered appropriate by the LAC.
- vi. H-World <http://www2.h-net.msu.edu/~world/>
- vii. AP World History listserv <http://lyris.collegeboard.com/cgi-bin/lyris.pl?sub=6109871&id=206092571>
- viii. American Historical Association website <http://www.historians.org/>
- ix. National Council for the Social Studies website and newsletter  
<http://www.socialstudies.org/>
- x. Any other websites, organizations, listservs, and newsletters one can think of, especially those relevant to the conference themes (e.g. H-Asia)
- b. Note: the Conferences and Program Committees and Local Arrangements Committee are also responsible for doing publicity on their ends. .

*C. Book exhibit: Soliciting, Promoting, and Organizing*

- a. WHA Secretariat is responsible for promoting the book exhibit and soliciting exhibitors from publishing companies, historical associations, and other relevant vendors/organizations.
- b. Many exhibitors will begin asking for information as early as a year in advance. Thus, as soon as possible, send past exhibitors an announcement and post Exhibitor Guidelines and Reservation form on the WHA website.
- c. The WHA may wish to canvas exhibitors for contributions to a door prize(s), to be drawn and announced at the last plenary session.
- d. Create the Exhibitor Guidelines and Reservation form.
  - i. Exhibit space:

1. Room must be large enough to hold 35-45 exhibit tables
2. Room must be able to be locked at night
3. Room should be centrally located at the conference site so as to encourage foot traffic between panels.
4. Having the coffee/beverage breaks in the same room is crucial in bringing people into the book exhibit. Make sure that the institution will allow food service (coffee/tea/alcohol?) in the book exhibit room.
5. Room should be well lit, have plenty of electrical outlets, and internet access (if available).
6. If there is surcharge for internet access, the Local Arrangements Committee should let the WHA Secretariat what it is so it can be included it on the Exhibitor Reservation sheet.

ii. Tables:

1. Find out table size and availability. Normally, the host institution has not charged extra for providing exhibit tables
2. Also needed: chairs, wastebaskets, tablecloths and/or bunting for the tables
  - a. Find out from Local Arrangements Committee if the institution charges extra for the bunting/tablecloths
3. Make sure host institution is providing labor for initial exhibit space set up and breakdown

iii. Drayage (the shipping, receiving, and storage of books):

1. Find out from Local Arrangements Committee details on storage space for the week before and day after the conference
  - a. Address, contact name, tel. number
  - b. Receiving dates (window of time in which the conference site will store books shipped to/from the conference)
2. Find out from Local Arrangers if labor will be available to assist
3. Find out if there are suggested shipping arrangements (for examples, in some places, UPS has an exclusive contract)
4. Find out the security arrangements (locked room, security guards?) for the space after hours
5. These details need to finalized as early as possible (2-3 months in advance of the conference), so that they can be conveyed in the Exhibitor Guidelines

e. Collect and track Exhibitor Reservation fees

- i. These will be paid by credit card or check
- ii. The WHA may need to follow up by billing the exhibitor

- iii. See office files at WHA Secretariat for past tracking methods
- f. As a courtesy, the WHA Secretariat should send Exhibitors a thank you note after the conference is over and, as it has done recently, it posts for free 75-word ads, along with their logos, on the WHA web site. Exhibitors and patrons are also prominently recognized in the Program.

#### *D. Advertising*

- a. Solicit advertisers from publishing companies, historical association, and other relevant vendors/organizations.
- b. Determine advertising specifics including: price, size, reservation deadline, format, etc.
- c. Compile this information in an Advertiser Guidelines and Reservation form
- d. Distribute this information to past advertisers and potential new ones and post it on the WHA website and/or conferences website.
- e. Advertisers to send copy via email in PDF format or other electronic format as necessary (they can also send hardcopy on cd, zip, or floppy as a back up)
  - i. Payment at least one month prior to event
  - ii. Ad copy at least 3 weeks prior to event depending on printing schedule
- f. Collect and track Advertiser fees
  - i. These will be paid by credit card or check
  - ii. You may need to send a follow-up bill
  - iii.
- g. If the Local Arrangements Committee or other group is laying out the printed Program, make sure to get them the advertisements well in advance.
- h. As a courtesy, the WHA Secretariat should send Program advertisers a copy of the printed Program after the conference is over

#### *E. Set up Catering Schedule*

- a. Work with Program Committee and Local Arrangements Committee to determine catering schedule.
  - i. With Program Committee, determine coffee & tea break schedule based on when panels start and end.
  - ii. With the Program and Local Arrangements Committee, determine when to schedule luncheon/banquet and host-sponsored reception
- b. Local arrangements committee is responsible for coordinating with local campus food services/catering office or off campus catering service
  - i. See above under Local Arrangements Committee section
- c. Costs:

- i. WHA Secretariat and sponsors pay for all food and beverage services, except when the local host funds a reception or luncheon.

*F. Program (more on this below under III: Conference Program)*

- a. In tandem with the Program Committee and Local Arrangements Committee, compile the information needed for the Program
  - i. Be sure a preliminary version is posted on the WHA website 3-4 months in advance
- b. Coordinate or handle the preparation of the printed Program
  - i. Printing of the program must be done locally at the conference site

*G. Communication with panelists and keynoters*

- a. Assist the Program Committee in sending confirmations, updates, and reminders re: advance registration to panelists (see above under Program Committee section)
- b. Assist the Program Committee in communicating with the keynote speakers regarding the date, time, and location of their talk, the amount of their honorarium, and reimbursement of their expenses.
  - i. Keynote speakers should receive the Reimbursement Form in advance (refer to Appendix F, Keynote Speaker Reimbursement Form & Policy).
  - ii. After receiving the Reimbursement Form, obtain the necessary signatures (i.e., for checks over \$500 and pay the keynoters their reimbursement and honorarium)
- c. Send keynoters a thank you note after the conference is over
- d. Some panelists have requested that the WHA make available a list of conference participants and/or panelists contact information (names, institution, email addresses) either in the Program itself or on-line after the conference is over. Whether this is done depends on the time available to the WHA staff. It was not possible to do so in 2003 and 2004.

*H. Other coordination and communication, as needed*

- a. Following the conference, WHA Secretariat should send thank you notes to the conference host, sponsors, keynoters, exhibitors, advertisers, and committee members. This is important to ongoing positive relationships.

**i. WHA pays for these costs**

- a. The Executive Council dinner.
  - b. Travel, honoraria, and expenses for keynote speaker(s)
  - c. Beverage breaks (outside sponsorship should be sought first for these events)

- d. Luncheon (per person amount should either be included in registration fee or offered for an additional charge)
- e. Cost of audio-visual equipment and technical support for panels
- f. Cost of group transportation from the conference hotel, if needed
- g. Cost of preparing and printing the program
- h. Onsite photocopy costs, if applicable
- i. Other necessary expenses not covered by local host or sponsors

## **f. Conference attendees are responsible for the following**

- A. *Individual registration and registration fee: Note, the fee is waived for keynote speakers and all recipients of awards. Otherwise, everyone pays, including current and past WHA officers.*
- B. *Travel costs*
- C. *Accommodations costs (hotel or dormitory, if the latter option is available)*
- D. *Parking at the conference site*
- E. *Conference luncheon costs (usually part of the registration fee)*
- F. *Any unusual equipment and supplies*

## **g. Conference program**

### **i. Content**

- A. Organization and scheduling of panels and selection of keynote speakers is determined by the Program Committee in tandem with the Conferences Committee and WHA Secretariat (see above under Program Committee for details)
- B. Advertising is solicited and coordinated by the WHA Secretariat
- C. Other program material (i.e., welcome letters, acknowledgements, brief schedule, announcements, etc) is supplied by the Local Arrangements Committee, WHA President, and other WHA Committees and is coordinated by the WHA Secretariat

### **ii. Formatting, Layout, and Printing**

- A. *Responsibility*
  - a. Formatting and layout of the printed Program is the responsibility of the WHA Secretariat.
- B. *Choice of printer, costs, and quantity*
  - a. Because of timing and distance, printing of the Program must be done locally, i.e., at or near the conference site.

- b. The Local Arrangements Committee should research and supply the WHA Secretariat with the name of several reputable but low-cost local printers.
- c. WHA Secretariat should determine how many programs to print based on the number of pre-registrants, expected number of on-site participants, and additional number needed as leftovers.

### **iii. Posting and Distribution**

#### *A. Web posting of preliminary program*

- a. The preliminary program should be posted on the WHA website.
- b. This is the responsibility of the WHA Secretariat..
  - i. It should be done as soon as the preliminary program is available, even though room assignments, etc, may not be finalized (3-4 months before event)

#### *B. Pickup and distribution of printed Program*

- a. This is the responsibility of the Local Arrangements Committee.
- b. extras should be available on-site

### **iv. Costs**

- A. Printing and layout costs are covered by the WHA Secretariat, unless a separate sponsor is found
- B. Advertising fees should cover all of these costs