

Best Practices for University Regional Conference Planning

Webinar
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Outline:

1. IIE Website Volunteer Tools
2. Planning
3. Sponsors (Fund Raising)
4. Keynote Speakers
5. IIE Certification
6. Other Advice

Theme: The earlier you start the process, the more successful and less stressful your experience.

Starting at IIE Homepage

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Training

Conferences

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Career Center

göErgo presents
The 17th Annual
applied ergonomics
CONFERENCE 2014
Practitioners talking with practitioners

Warm up to the latest ergo solutions
Save as much as \$380 if you register for AEC 2014 by March 16. Learn and network at more than 90 sessions, pre-con workshops, facility tours and Ergo Cup® exhibits.

The banner features a background image of palm trees and a sunset over a body of water. A yellow circle highlights the 'Communities & Groups' menu item, and a yellow arrow points from it to the 'applied ergonomics' text in the banner.

WHAT DO YOU WANT TO DO?

- Join IIE
- Renew my Membership
- Volunteer
- Find or Post a Job
- Advertise/Exhibit with IIE
- Nominate
- Contact IIE

Select Volunteer Tools

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A banner for the 17th Annual Applied Ergonomics Conference 2014. The background shows palm trees and a building at sunset. The text reads: 'GOErgo presents the 17th Annual Applied Ergonomics CONFERENCE 2014 Practitioners talking with practitioners'. Below the banner is a dark blue box with white text: 'Warm up to the latest ergo solutions Save as much as \$380 if you register for AEC 2014 by March 16. Learn and network at more than 90 sessions, pre-con workshops, facility tours and Ergo Cup® exhibits.'

Communities & Groups

- Communities & Groups
- Academics
- Awards & Scholarships
- Chapters & Regions
- IIE Leadership ▶
- Member Directory
- Social Networks ▶
- Societies & Divisions ▶
- Students
- Volunteer Tools
- Young Professionals

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Select Student Chapters

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MANAGE YOUR CHAPTER

Student chapters

Find all the tools you need to create a successful student chapter. Includes information on running your University Region Conference.

Student chapters

Professional chapters

Whether you are new to your chapter leadership or are a returning officer, this section has everything you need to grow or even reactivate your chapter.

Volunteer tools

IIE offers online resources and year-round training for you.

Chapter networking

Many professional and student chapters find it helpful to network with nearby chapters. Go to the list of [chapters by region](#) to find the groups closest to yours.

Chapter management FAQs

Quick answers to the most frequently asked questions about running your chapter.

Student Chapter Management

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STUDENT CHAPTER MANAGEMENT

IIE Continuing Education on Campus

IIE's continuing education department has instituted a program through which we will come to your campus, usually on a Friday, Saturday and Sunday, and present either Six Sigma green belt or lean green belt training immediately followed by IIE's certification examination. And we do this for students at a discount of over 60 percent off the regular IIE member prices.

The way the process works:

1. Contact IIE to let us know you are interested (training@iienet.org). We will send you specific details on the costs and requirements.
2. Pick your dates. We do have a finite number of instructors, so the sooner you select the better.
3. Confirm a classroom or meeting room with an LCD projector and white board or flip chart availability.
4. Promote the class to your members, other IE majors, other engineering majors, and even other related disciplines on campus.
5. Collect the registration fee (and maybe even add a little bit on for your chapter). We can even help with an online payment system.
6. Send the registration information to IIE headquarters.
7. Attend the course, pass the exam, and receive your green belt certification.

Chapter operations

- [Start a chapter](#)
Organize a new chapter at your university
- [Reactivate a chapter](#)
Steps to reactivate an inactive student chapter
- [Student chapter deadlines](#)
Deadlines for the coming year
- [Student chapter requirements/health report](#)
Requirements, health status descriptions, and check

*Scroll Down to
University
Regional
Conferences
(Organize your
regional
conference)*



Select “Organize your regional conference”

Membership

- [Accessing your member roster](#)
How to download and interpret your chapter roster
- [Membership recruitment](#)
Tools to help you solicit new members
- [Chapter Needs Survey](#)
Find out what members expect from your chapter

Webinar PowerPoints

- [Student Chapter Kick-Off for Student Leaders and Faculty Advisors](#)

University Regional Conferences

- [Regional conference schedule](#)
Find out where your region's conference will be held this year
- [Organize your regional conference](#)
Host chapter responsibilities, checklists, and timelines
- [Regional Conference Rotation Plans](#)
[Southeast Region](#)

2013 Student Chapter Recognition Awards

(U.S. and international; based on the 12/13 UCAR)

- [GOLD Award Chapters](#)
- [SILVER Award Chapters](#)
- [BRONZE Award Chapters](#)

2012 Student Chapter Recognition Awards

(U.S. and international; based on the 11/12 UCAR)

- [GOLD Award Chapters](#)
- [SILVER Award Chapters](#)
- [BRONZE Award Chapters](#)

[guidelines and templates](#)

Templates to start your operations plan

- [Succession planning](#)
Keep your chapter going by planning for future leaders
- [Promotion materials center](#)
Request or download materials to distribute at your next chapter event
- [IIE Logo Guidelines](#)

Important Contact Information

- [2011-2012 Regional Operations Board](#)
Senior Vice President
Regional Operations
Assistant Vice
President Regional
Operations
Vice President for
Student Development
Regionl Vice Presidents
and Region Leadership
Teams (U.S. and
Canada)

Website and Volunteer Tools

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HOST CHAPTER RESPONSIBILITIES

The main objectives of the university region conference are to:

- Provide a forum for the presentation of student papers reflecting undergraduate research and industry-based projects.
- Stimulate research and creative thinking through team competitions.
- Promote leadership, communication, and organization skills.
- Develop networking skills and contacts.
- Strengthen communication among chapters within the region and with IIE.

Objectives & Eligibility

Eligibility requirement: **A chapter must be in GREEN status.**

Keep in mind that your primary audience is students of industrial engineering. You have the responsibility of providing an exciting experience to all students attending. Here are the tools you need to run a successful conference:

- [Assembling a team](#)
Committee descriptions and responsibilities
- [Checklist and timeline](#)
A planning calendar to get you started

Tools



Volunteer Tools

Keep in mind that your primary audience is students of industrial engineering. You have the responsibility of providing an exciting experience to all students attending. Here are the tools you need to run a successful conference:

- [Assembling a team](#)
Committee descriptions and responsibilities
- [Checklist and timeline](#)
A planning calendar to get you started
- [Required reports and deadlines](#)
Keep on top of the reporting deadlines to get your funds from IIE
- [Developing a budget](#)
Details on budgeting, fundraising, and funding available from IIE
- [Designing the conference program](#)
Includes speakers, tours, activities, student competitions, etc.
- [Undergraduate Student Technical Paper Competition](#)
How to run this important competition
- [Marketing and communication](#)
Promote your conference within your region
- [Best practices](#)
Learnings from previous university region conferences

Have more questions? Contact [Bonnie Cameron](#), IIE headquarters operations administrator or [Joe Wilck](#), VP student development.

Tools

Some of these tools and guidelines are perhaps outdated (e.g., it is now recommended that you seek sponsorships and make reservations a year in advance).

But the premise remains the same.

These tools are updated occasionally; thus, when your chapter is 1-2 years away from hosting – then you should reacquaint yourself with the tools and process.

Planning

Each university and location is different in terms of hotel and conference space. Also costs will be different in different locations.

However, a general suggestion is 1-2 years prior to hosting the conference, the following should be planned:

- **Dates**
- **Reserve Facilities (e.g., hotel, conference location)**
- **Preliminary Budget**
- **Plan and implementation for sponsors (fund raising)**

Note, often you can negotiate hotel room rates, extra hotel space for conference meetings, A/V equipment, etc. if you have enough conference-goers and hotel rooms rented. Ask the prior years' hosts for final counts on number of attendees and hotel rooms rented (sometimes the hotel keeps a record as well).

Sponsors

Soliciting sponsors for the conference is usually the most difficult task for student chapters. A key to this process is to get started early (at least 1 year in advance), and to utilize your network.

Addresses and contacts should be solicited from the following:

- **Prior years' sponsors**
- **Internship and Co-op employers**
- **Career Services Contacts**
- **Departmental Contacts**
- **Alumni**
- **Professional Chapters and members in region**

Sponsors

Note, you will need to have a “selling point” (e.g., brochure, elevator speech) for these potential sponsors. So having an idea of how many students will attend, how many universities will be represented, how many states, etc. will be helpful. Also, providing sponsors with special access to the students as a “recruiting” event for the company.

Many company contacts will need to work this money into their future budget; thus, requests will need to be sent earlier (sometimes up to a year in advance) rather than later.

Oftentimes it is much more effective to make these requests in-person (at on-campus career fairs, with a brochure about the conference) or via phone.

A “Menu” for Sponsors

It is advised that as the agenda is made for the event, that potential sponsorship opportunities are identified; consider this a “menu” of opportunities to offer to potential sponsors. For example,

- **Technical Paper Competition (Regional Level)**
- **Keynote Speaker(s)**
- **Meals**
- **Sessions**
- **Job Fair**
- **Name Tags, etc.**

And in exchange for the partnerships the sponsor will receive different levels of access to the students and attendees. Essentially, the company will need to view this as a recruiting event. Also, the sponsors will expect their logo to be professionally placed during the events in which they are sponsoring.

Keynote Speakers

There are a number of ways to solicit Keynote speakers. In some cases these speakers will be tied to a sponsor (as part of the sponsorship from a company). Other cases include using departmental contacts and alumni.

But it is in the host chapter's best interest to have "back up" plans in case of last minute cancellations. For example, most of the USA regional conferences have an IIE Board of Trustees member in attendance, and that person could be used as a Keynote Speaker. Perhaps the department has a renowned faculty member and/or nearby alumnus that would be willing to serve as a Keynote Speaker on short notice.

IIE Certification

IIE does offer certification in a number of areas. In the past it has been found that White and/or Yellow Belt Training for Six Sigma or Lean can be included on the front-end or back-end of the university regional conferences. These training sessions are 1-day events.

This would need to be planned and scheduled with IIE's Training group (<http://www.iienet2.org/iietrainingcenter/default.aspx>).

Other Advice

Budgets and Plans:

Develop a pessimistic budget and plan as well as an optimistic budget and plan. (*Again, the prior years' hosts could provide their materials to aid in the planning process.*)

For example, the pessimistic budget would include “pizza and soda” type meals and the optimistic budget would include a “served hotel meal.”

A pessimistic plan would include having sessions in classrooms, and an optimistic plan would be to have sessions in a hotel's conference center.

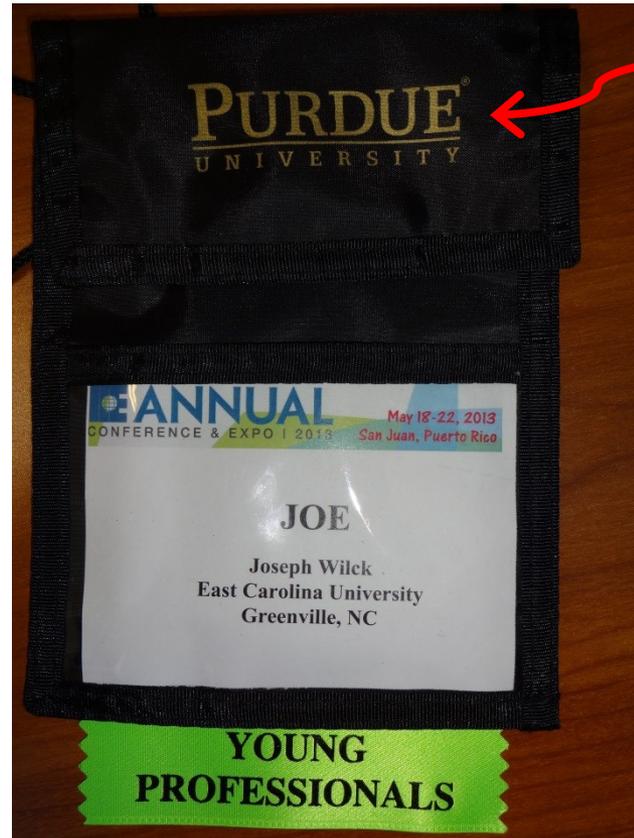
Other Advice

Other areas for budgeting and plans ...

Pessimistic:



Optimistic:



Sponsor

Other Advice

Volunteers (e.g., Keynote Speakers, Judges, Panelists) do not have to be paid, compensated, or given an elaborate gift.

Perhaps you can pay for parking, but do not feel obligated to pay hotel and travel expenses (if this is required, then you may need to find a new volunteer).

Other Advice

Do not expect everything to be perfect.

You will have to reach out to 100s of potential sponsors to get a few financial sponsors. (Another reason to start early.)

Food (especially catered) is expensive (and don't forget the automatic gratuity).

The earlier the better ...

Thank You!

IAB YouTube Video Contest: Deadline Extended to March 15!

**Upcoming Webinar: April 10, 2014 (Thursday); 2PM-3PM (EST)
“Student Chapter Required Documents Step-by-Step Guide”**

Student Chapter Items Due on April 30:

- Officer Slate (due once per year, default is April 30)
- Bank, Financial, and Tax (ePostcard) Statements
- UCAR

Note: Faculty Advisor must verify (via email) and do not let memberships lapse – particularly for officers/advisors!

Student Chapter Management Website:

<http://www.iienet2.org/Details.aspx?id=10116>

Contacts:

IIE Headquarters: chapters@iienet.org

RVPs: <http://www.iienet2.org/Details.aspx?id=334>

Presenter (Joe Wilck, VPSD): joe.wilck@gmail.com

Director of Membership (Heather Bradley Story): hstory@iienet.org

**INDUSTRIAL ENGINEER
BY DAY,
SUPERHERO
BY NIGHT**