

Standalone Meeting Planning Guide

For Meetings Organized by Volunteer Members of the AMS Commission on the Weather, Water, and Climate Enterprise (CWWCE), Its Boards, and their Committees

1. Introduction

The purpose of this Meeting Planning Guide is to provide information to assist AMS volunteers and AMS staff who, working together in close collaboration, plan standalone meetings organized by members of the AMS Commission on the Weather, Water, and Climate Enterprise (CWWCE), its Boards, and their Committees. The focus is on standalone meetings, and not on meetings that occur as part of the AMS Annual Meeting, as those meetings differ in several fundamental aspects from standalone meetings.

Since CWWCE was established in January 2005, a number of CWWCE standalone meetings have been held, and a body of knowledge about how to plan them has developed. Until now, however, there has been no systematic way to document this body of knowledge and pass it along to new meeting planners from both the AMS volunteer corps, and from the AMS staff. This Guide is an attempt to fill that void.

The body of knowledge about how to plan standalone CWWCE is not static, and this Guide will be revised as the body of knowledge grows and improves.

At present CWWCE volunteers organize two standalone meetings each year. The AMS Board on Enterprise Economic Development (BEED) organizes the AMS Washington Forum (AWF) in Washington, D.C. in March or April, and the AMS Board on Enterprise Communication (BEC) organizes the AMS Summer Community Meeting (SCM) in July or August. The SCMs are held at a variety of locations, but typically at universities and at UCAR/NCAR.

While these two annual CWWCE standalone meetings have much in common, they also have significant differences from a meeting planning point of view. Although some differences are mentioned below, the focus here is on their common attributes.

The remainder of this guide discusses meeting models, responsibilities, working together, deadlines, points of contact, and communication protocols.

2. The CWWCE Meeting Model

This section provides information that may help AMS volunteers better understand other parts of this document. CWWCE volunteers planning AMS meetings need to know that the meeting model that AMS uses for CWWCE meetings differs substantially from the model used for other AMS meetings.

Here are some of the ways that standalone CWWCE meetings differ from other standalone AMS meetings and from the AMS Annual Meeting:

- For the most part, CWWCE meetings address issues of interest to the broad weather, water, and climate community. They focus on ways the community can come together to support common goals, or solve common problems, and do not normally address the advancement of our science or technology per se.
- At STAC meetings, speakers are internally motivated by the opportunity to report on their scientific and technical work and most attendees are also speakers with the same internal motivation to attend. At CWWCE meetings participants (speakers, panelists, etc.) must be recruited, invited, and sometimes encouraged to participate.
- The AMS works hard to lower barriers to participation in CWWCE meetings to make the meetings

more attractive to a wide audience. One potential barrier to participation is the cost of travel. AMS can minimize this barrier by drawing most attendees from the local population. This approach is viable only when the CWWCE meeting is held in a city with a large number of people who are members of the weather, water, and climate community. Thus the number of cities that can host successful standalone CWWCE meetings is limited.

- **Cost Factors:** Another potential barrier to participation is the registration fee. For the meeting to be successful it must attract a critical mass of attendees. Thus, AMS needs to set the CWWCE meeting registration fee as low as possible. But, the meeting must be financially successful too, so AMS must set the registration fee high enough to avoid depleting the CWWCE budget. CWWCE meetings do not use abstracts and AMS does not collect abstract fees, a major source of meeting revenue for other AMS meetings, and another cause of financial constraints for CWWCE meetings. Free/low cost meeting space and support is important, because it is another reason that AMS can set the registration fee low enough to encourage good participation from the local community. Another way AMS keeps registration fees as low as possible is by seeking sponsors for CWWCE meetings.
- AMS relies on host facilities to provide audiovisual (A/V) equipment for standalone CWWCE meetings. It also relies on host facilities for the technical support of their A/V equipment during the meetings. To avoid A/V support problems, AMS meeting planners negotiate with host facilities/vendors to assure local A/V technical support will be available throughout all CWWCE standalone meetings.
- To encourage networking among the attendees, during the CWWCE meeting and later, a list of participants and preregistered attendees, with brief participant biographies, is made available to all attendees, online and/or in hardcopy.
- All participants of CWWCE meetings, including the master of ceremonies, speakers, panelists, moderators, and session chairs, are invited to participate by the CWWCE meeting program committee.
- Because they are invited, many speakers and other participants of CWWCE meetings expect to receive a complimentary meeting registration. In the past, complimentary registrations have been limited to invited participants who are employed by organizations that are not part of the weather, water and climate community. Recently, the planners of the AMS Washington Forum have adopted a new procedure, whereby all invited participants are offered complimentary registration. The reasoning here is that it encourages participation by the highest quality of speakers, which in turn draws more general attendees to the event, thereby offsetting the lost revenue from the complimentary registrations. To further compensate, the number of invited participants per panel session at the AMS Washington Forum is restricted to one moderator and four or fewer panelists.

3. Staff and Volunteer Points of Contact

The AMS has identified three key staff members that will provide support to the CWWCE. The support roles are defined as follows.

Strategic Support – Bill Hooke (hooke@ametsoc.org). The primary point of contact on staff for support in strategic planning within the commission and will help ensure that intersections between commission activities and other AMS programs and initiatives are recognized and coordinated. Bill will participate in as many conference calls of the various boards and committees as he can and be available to the three commissioners for discussion and guidance.

Logistic Support – Sotiria Qirjazi (sqirjazi@ametsoc.org). Will handle all logistic support for Enterprise Commission meetings and events throughout the year. Sotiria is an experienced meeting planner and will be handling all of our meetings occurring at the AAAS building, so she is developing a strong relationship

with the AAAS support staff that will help make planning and execution of the AWF smoother. While based in Boston with the rest of the meetings staff, Sotiria will spend more time in DC than any of the other meetings planners, providing support for the Summer Policy Colloquium and other DC meetings in addition to the AWF. Note: Gillian will continue to provide support for the AMS Annual Meeting.

Communication Support – Tom Champoux (tchampoux@ametsoc.org). Will lead communications efforts for the commission, including the listserv that Gary had managed. We have begun transitioning that to a new platform that will make it easier to administer and we have discussed an overall rebranding of the list to increase its reach and effectiveness. We recognize that part of the success of the list was Gary's careful management of what was posted to it, and Bill and Tom will work together on content and focus to maintain a high level of value in the messages delivered through the list. Requests for posting to the list serve should be directed to pslmoderator@ametsoc.org

More generally, the web page at: <http://www.ametsoc.org/exec/contacts.html> maintains current contact information for the following AMS staff points of contact:

AMS Executive Director: Point of contact for sponsorships of CWWCE events.

AMS Director of Meetings: Point of Contact for listing CWWCE events in the AMS Meetings Calendar online and in BAMS.

AMS Outreach and Marketing Program: Point of Contact for placing full-page or half-page advertisements of CWWCE events in BAMS.

The [CWWCE web page](#) maintains current information for volunteer members of the CWWCE:

BEC Chair: Point of contact for all BEC activities such as the Summer Community Meeting (SCM).

BEED Chair: Point of contact for all BEED activities such as the AMS Washington Forum (AWF).

CWWCE Commissioner: Point of Contact for any travel reimbursement requests and for clarification of any and issues or concerns about CWWCE activities.

In addition to the above points of contact, each meeting venue typically assigns one or more venue points of contact. Normally all communications on venue logistics occur between the AMS Meeting Planner and the venue points of contact, and do not directly involve the volunteers. It is the responsibility of the AMS Director of Enterprise Activity Support and the AMS Meeting Planner to facilitate any necessary communications between the venue points of contact and the CWWCE volunteers.

4. Responsibilities of AMS Staff Members

This section lists some specific responsibilities of the AMS staff members planning a CWWCE meeting. Section 4 lists some specific responsibilities of the AMS volunteers. In general, volunteers specify meeting requirements (who, what, when, where) and staff members aim to fulfill the requirements. Note that the meeting locale is a joint responsibility as it is suggested by the volunteers and confirmed by the staff.

In allocating responsibilities between AMS Staff and AMS volunteers there are only a few hard rules. One hard rule is that AMS staff members are solely responsible for all of the financial and logistical aspects of the meeting. AMS staff members:

- Confirm the feasibility of the suggested meeting locale and select a venue. Arrange for meeting room layout, local A/V equipment and local A/V support, and make other logistical decisions. The total venue expense must be compatible with the meeting budget. The venue must be able to host the number of attendees expected. The venue must have adequate A/V equipment and be able to supply A/V troubleshooting support throughout the meeting. The A/V equipment and support may be provided by the venue itself, or by a local vendor, providing that the vendor fees are compatible with the meeting budget. The venue or a local caterer must be able to furnish specified food events

consistent with the meeting budget.

- Set and collect all fees associated with the meeting. AMS staff members set registration and other fees as low as possible to maximize attendance and high enough to minimize meeting subsidies.
- Seek sponsorships to help defray meeting costs. Volunteer suggestions and assistance are always welcome.
- Handle preregistration and onsite registration at meetings. AMS staff members address all questions, comments, and requests concerning registration from meeting participants and attendees. AMS meeting planners secure registration desk assistance from a local organization if that is needed.
- Choose menus for breaks, luncheons, banquets, and other food events.
- Control access to the meeting to assure that all attendees are registered.
- Provide meeting security if needed.
- Enter into contracts with venues, caterers, equipment suppliers, etc.
- Promote the meeting on the AMS web site and via the AMS_PSL e-mail list.
- Display a sign at the registration desk that clearly identifies the event as an AMS event. Provide additional signs in the form of one or more PowerPoint slides to display via the meeting room projector, before, after, and between meeting sessions. The additional signs thank event sponsors and identify the meeting as an AMS event.

While logistics decisions are the responsibility of the AMS staff, the staff welcomes (but does not require) volunteer suggestions and input on all aspects of logistics planning.

5. Responsibilities of AMS Volunteers

This section continues the discussion with a list of responsibilities of CWWCE volunteers. Another hard rule in allocating responsibilities is that the meeting program is the sole responsibility of the volunteer meeting planners. CWWCE volunteers:

- Determine whether or not to hold a meeting.
- Suggest a meeting locale (see the previous section).
- Determine session topics, the order of sessions, and their contents.
- Invite people to participate in specific roles (master of ceremonies, session chair, individual speaker, luncheon and/or dinner speaker, panelist, moderator, etc.) and maintain contact with invitees.
- Create and maintain the meeting agenda, and periodically forward the agenda to the AMS to be posted onto the AMS web site.
- Facilitate information exchange between invitees and AMS staff members. For example, when inviting people to participate in CWWCE standalone meetings the CWWCE volunteers should tell invitees that:
 - o All active participants are responsible for their own travel arrangements and expenses¹.

¹ In a limited number of circumstances AMS may reimburse partial or full travel expenses for an essential participant (a speaker, etc.) who is not employed within the weather, water, and climate community. The request for travel reimbursement must be in

- o All active participants are expected to preregister for the CWWCE meeting as soon accepting the invitation to participate².

Volunteers should refer questions to the designated AMS meeting coordinator.

- Finalize the meeting program in accordance with all meeting deadlines (see section 6).

6. Working Together

The AMS staff wants to be flexible in planning each CWWCE meeting in close collaboration with AMS volunteers to maximize the meeting experience for attendees, volunteers, and staff members.

The two previous sections list some of the responsibilities of AMS staff members and CWWCE volunteers. But, despite all of the rules, there is a lot of flexibility.

AMS staff members welcome volunteer input on all logistical decisions, and welcome volunteer assistance in securing sponsorships.

MS can publish full-page or half-page advertisements in BAMS to help promote CWWCE meetings, but the decision of whether or not to advertise the meeting in BAMS is up to the volunteers, since they are the ones who must generate the ad text.

The initial meeting agenda (meeting concept) will be developed by the appropriate CWWCE Board and presented to the CWWCE Commissioner for review and discussion. The CWWCE Commissioner in consultation with the CWWCE Executive Committee and key AMS staff members and Executive Director will approve the meeting agenda. The organizing Board will finalize the agenda as appropriate to ensure a successful meeting. It is expected that the development of a final meeting agenda will take many iterations over several months.

7. Deadlines for Standalone CWWCE Meetings

To allow sufficient time to adequately plan the meeting, the following deadlines have been established. The **AWF** normally meets in March or April and the **SCM** normally meets in July or August. To make these deadlines easier to use, the corresponding lead times in full months before the first day of the meeting for the **Mar/Apr AWF** and the **Jul/Aug SCM** are shown in the headers below.

No later than 10 months before the meeting (AWF: Jun/Jul; SCM: Oct/Nov)

- Volunteers and staff members identify the desired meeting locale and dates (city, state).
- Staff members identify one or more hotels for attendees and begin negotiating room blocks

No later than 8 months before the meeting (Jul/Aug; Nov/Dec)

- Staff members confirm the venue
- Volunteers identify the meeting theme(s) and draft sessions
- Volunteers identify the program chair (may be the board chair or someone else)

No later than 7 months before the meeting (Aug/Sep; Dec/Jan)

- Volunteers identify the program committee members

writing. It must include a detailed expense budget and explanation. And, it must be approved well before the meeting date by both the appropriate CWWCE Board Chair and the CWWCE Commissioner.

² AMS expects organizations that are part of the weather, water, and climate community to be responsible for the registration fees of employees who participate. On request, AMS will waive registration fees for participants (speakers, etc.) who are not employed within the weather, water, and climate community.

- Volunteers and staff members review tasks and deadlines and identify potential sponsors
- Coordinate advertising materials between volunteers and staff members
- Staff members develop the meeting budget

No later than 6 months before the meeting (Sep/Oct; Jan/Feb)

- Staff members, with input from volunteers, begin seeking sponsorships
- Volunteers, with staff help if necessary, begin recruiting speakers and other participants
- Volunteers and staff discuss desired special events such as press conference, tours of local facilities, receptions, and banquets. Receptions cannot include open bars unless they are sponsored
- Volunteers and staff update a publicity plan
- Staff members advertise the meeting with a “Mark Your Calendars” message circulated via AMS_PSL

No later than 5 months before the meeting (Oct/Nov; Feb/Mar)

- Volunteers submit copy for BAMS advertisements to the AMS Manager of Marketing and Special Programs (this is for the January BAMS)

No later than 4 months before the meeting (Nov/Dec; Mar/Apr)

- Volunteers finalize the program elements (session topics, talk topics, panel discussion topics, tours, receptions, banquets, etc.).
- Staff members set the registration fee and, if applicable, other fees
- Staff member finalize attendee hotel arrangements
- Staff members advertise the meeting via AMS_PSL

No later than 3 months before the meeting (Dec/Jan; Apr/May)

- Staff members open online preregistration
- Staff members advertise the program (session outline), and attendee hotels in the meetings section of the AMS web site and by e-mail via AMS_PSL

No later than 2 months before the meeting (Jan/Feb; May/Jun)

- Volunteers begin to finalize the detailed agenda. Most speakers and other participants are confirmed. Tentative agenda is posted on AMS website.
- Volunteers and staff members make travel arrangements
- Volunteers create draft press release
- Staff members, in collaboration with the volunteer program committee, finalize menus for all food events
- Staff members finalize arrangements for onsite registration support and local A/V support
- Staff members finalize venue and other logistical arrangements

No later than 1 month before the meeting (Feb/Mar; Jun/Jul)

- Volunteers and participants identify any special A/V requirements in consultation with staff members
- Volunteers finalize the detailed agenda (all speakers and other participants confirmed) and

transmit it to the staff

- Staff members post the final agenda online
- Volunteers finalize press release
- Staff members advertise the final agenda in the meetings section of the AMS web site and by e-mail via AMS_PSL
- Staff members finalize the list of participants and preregistered attendees
- Staff members duplicate the agenda and other handouts and ship them to the venue
- Staff members order any necessary signage and have it shipped to the venue

Our natural inclination is to discount the need to observe these deadlines. But doing that only adds to the stress experienced by everyone involved in planning the meeting. Please observe all deadlines.

8. Communication Protocols

Unless there is a specific reason to exclude someone, all of the staff members and volunteers listed in the previous section should be copied on all e-mail communications and invited to participate in conference calls about planning CWWCE events. In addition, other interested parties should be copied too, including all active Past and Future Board Chairs and Commissioners. Correspondents may, at their discretion, include additional people in the recipient list, should that be prudent.\

9. Concluding Remarks

In conclusion, it is worth emphasizing that a successful meeting requires careful planning, teamwork, and good communications. If all parties perform their duties as outlined in this guide, the result is bound to be a highly successful meeting.