PTO Conference Process Guide

Pedagogy and Theatre of the Oppressed (PTO) invites proposals to host its annual gathering, usually held in the late spring/early summer of each year (typically May or early June). Recent conferences have registered around 200-300 participants in such cities as Omaha, Toledo, Minneapolis, New York, Chapel Hill, Austin, Chicago, Detroit, Indiana (PA), etc. That said, the conference does not always have to take place in the US; it simply has up until this point.

The following information is intended as a general guide to the typical features of a PTO Conference, followed by a step-by-step information on process. We request that each local conference committee try to include/address the following standard features in some way, yet we also know that each local group’s process will be different, rooted in specific communities and histories of organizing particular to each place our conference calls home. We look forward to conferences that honor the uniqueness, imagination, and other resources of the local hosting communities.

PTO MISSION STATEMENT

Pedagogy & Theatre of the Oppressed, Inc. (PTO) supports people whose work challenges oppressive systems by promoting critical thinking and social justice through liberatory theatre and popular education.

Our approaches stem from the theories and practices of Paulo Freire and Augusto Boal. We foster collaborative connections to share, develop, promote, and document liberatory theatre, popular education, and other revolutionary actions. PTO serves as a resource for oppressed peoples and their allies in diverse communities, contexts, and traditions around the world.

Core Features of the PTO Conference

(These are just a sketch; see additional information in the pages that follow.)

1. Focus

The conference values praxis--action and reflection—at the same time. The conference should reflect the organizational mission (see above). We aim to feature Theatre of the

Oppressed and Pedagogy of the Oppressed equally, but we do not feature those practices exclusively. We welcome any contributions informed by the principles and practices of TO and/or PO, but we also welcome work of a similar spirit and political orientation that does *not* spring directly from the same roots as TO and PO. In other words, if the process or goals of the work resonate with the spirit of our mission, the work is welcome at PTO, regardless of whether those presenting it have ever heard of Freire or Boal before.

2. Workshops

Pre- and post-conference workshops on TO and PO--and other related practices are encouraged. Workshops should be priced so that they can pay for themselves. In the past the following models have been used for workshops: 3-day workshops, 2-day workshops, 1-day workshops. We try for a balance of TO and PO workshop offerings. You are encouraged to speak with board members and other people who have worked on the conference before so that you can best strategize about which workshop combination will be most sustainable for your local group.

3. Keynote speakers and/or keynote artists/keynote plenaries

These are encouraged, though overall the conference should focus on participants rather than--or at least as much as--featured guests. The local conference committee submits a list of keynote speakers/artists to the PTO Board for approval. In some years, the local committee has negotiated contracts, plans for registration to accommodate costs, etc. (with input and assistance from PTO Board). In other more recent years, by agreement between the board and the local committee, board members have often arranged those contracts so that the legal agreements happen between PTO and the individuals. Typically the PTO Board has paid a $500 USD honorarium for each keynote session or special presenter. Some exceptions have included the following: a) conference plenary panels whose contributors share the $500, b) pre-conference workshop facilitators and post-conference workshop facilitators, whose payments are negotiated under separate budget, c) instances in which the local committee has raised money through other means that allow them to augment the traditional $500 USD honorarium. All fees should be factored into the budget proposed by the local committee. (See Item 8 here.) Any additional keynote funds beyond $500 are raised by the local committee.

4. Presentations

A variety of presentation forms are encouraged from international as well as local and national participants, with particular invitation to PTO members. The PTO Board will help the local organizing committee review proposals.

5. PTO Membership Meeting

Required at every conference. The membership meeting should be scheduled at a time when there are no conflicts—no other panels or offerings scheduled opposite it. It is strongly suggested that you have the membership meeting on the second-to-last day (so, for example, Saturday if you are working on a Thursday-to-Sunday model) so that the current board members have time to meet conference attendees, identify potential future board members, and encourage attendance at the membership meeting. Fuller attendance at membership meetings means more agency for the membership.

6. Networking

We recommend open spaces in the schedule for community building, networking, reflection, spontaneous workshops/discussions, and perhaps regional meetings.

7. Program

FAQ—We recommend the inclusion of Frequently Asked Questions (which the PTO Board provides) about PTO in the program. The PTO Mission statement should always be prominently included in the program.

8. Budget

Conferences should be designed and planned to not lose money. That is, each conference should pay for itself through registration and not be designed to spend more than anticipated income. Each local organizing committee submits a budget for their conference, and the PTO Board approves the budget and/or proposes amendments before approving (see timeline for more information). The budget should be as detailed as possible. The Board, particularly through the Treasurer, oversees the process of disbursing funds according to the budget that has been approved. Any other expenses beyond the budget approved by the board are the responsibility of the local committee. We encourage local fundraising. In the past, the Board has approved a budget of approximately 20,000-23,000 USD. Essentially, the local committee becomes stewards of the PTO membership's money. All monies earned from the conference go back into PTO's bank accounts for the following year.

9. Access

Participation should be accessible to community organizers, activists, artists, and academics, and those with all levels of physical ability. We encourage diversity among those attending and presenting and recommend proactive networking and community involvement. Volunteers should be coordinated. Low cost housing should be available and Child care options examined. Please also be attentive to creating the most gender-inclusive environment possible, including non-gendered restrooms. All possibilities for language translation (especially into Spanish and ASL) should be explored.

10. Documentation

We recommend that the conference is documented in some ways through, for example, videos, photos, written notes. It is possible for volunteers to trade documentation labor for conference registration with coordination with the PTO board.

11. Evaluations

There should be digital and live evaluations of the conference. The local conference committee can decide what form the live evaluation will take: discussions, Image Theatre, a closing activity, etc. A standard digital evaluation form should be provided by the PTO board each year, though the local committee may wish to add questions to that standard form. Insights from evaluations should be shared with hosts of the next conference. In the next year's conference program, the PTO board should provide a statement about how PTO responded to the evaluations, making direct connection to the mission statement.

12. Passing It On

Organizers should compile and communicate experiential wisdom.

13. Green

Conferences should, wherever/whenever possible, aim for zero waste, including food waste.

14. Lunches

Lunches are provided by the conference, one on each full conference day (so on a Thursday-Sunday model, lunches are provided on Friday and Saturday). Vegetarian, vegan, and gluten-free options should be available, and a notice should be put up on the website—by the time registration opens—that encourages those who have other specific food requirements to contact an appointed person on your local committee.

Where possible, food should be sourced from local organizations rather than large corporate chains. University/College host sites frequently require utilization of their on-campus food services.

Typical Division of Responsibilities for PTO Conference

Below you will find descriptions of past divisions of responsibility between the PTO Board and the local host committee/institution. The actual arrangements are negotiable, subject to the resources and abilities of the host committees and institutions. Most important, at the beginning of the collaboration between the local committee and the PTO Board, all parties should discuss the most useful, transparent ways to communicate throughout the planning process.

Responsibilities of PTO Board of Directors

- Direct all activities related to the ongoing maintenance, health, and growth of the organization itself.

- Be available to offer feedback as requested by the local conference committee.

- Maintain the PTO Website.

- Appoint a board member to serve as liaison to the local organizing committee for all website communication regarding the conference. The local committee and the web liaison work together to clarify what information is needed online, what form is necessary for conveying that information, and what the web information timeline should be.

- The web liaison works with the local organizing committee to create a timeline for e-mail blasts and to develop the content for those e-mail blasts.

- Provide labor support prior to and during the conference, as requested by the local conference committee.

- Provide “institutional memory” for conference coordinators, including information such as timelines and any sample forms or contracts.

- Provide assistance via our board conference liaison.

- Run each year’s scholarship process, including any special scholarships for local attendees.

- Assist in handling conference registration (Treasurer) and in responding to issues concerning registration costs, fundraising, and budget.

- Provide reimbursements (Treasurer) to local committee for items included in the approved conference budget, as well as a small amount of discretionary funds for supplies for local committee meetings. Local committee must save all receipts needing reimbursement!

- Respond to/vote to approve the local committee’s proposed budget in a timely fashion.

- Assist in the solicitation of pre-conference, post-conference, and all-conference presenters, where requested.

- Plan and facilitate the General Membership Meeting held at the conference, ensuring all legal requirements for the Membership Meeting are met.

- Assist the local hosts with all planning related to special guests of the conference who are traveling, especially internationally. In particular, visa assistance and research may be required. We also try to support regular conference attendees who require official documentation for visas or other specialized visa assistance.

- Provide on-site registration and name tags as well as digital and print conference programs.

- Oversee, in conjunction with local organizing committee, the publication of the conference Call for Proposals, including the receipt, review, and response to workshops/panels/performances, including mentoring proposals from new presenters and presenters from historically excluded groups. Communicate with proposers confirming their selection status, room needs, and time of presentation in a timely manner.

Local Host Committee Responsibilities

- Build partnerships with local organizations, educational institutions, etc.
- Develop the conference theme and select all-conference performances, panels, keynotes—in communication with the PTO Board.
- Oversee all local arrangements, including reserving blocks of hotel rooms (in partnership with PTO Board), securing assistance for people with disabilities, and, if possible, provide childcare.
- Develop budget and submit that budget to the board. *(In order for us to keep PTO sustainable, any funds beyond what the board and the local committee agree on initially will need to be raised by the local committee.)*
- Communicate questions and concerns with relevant board members, in particular by regularly informing the liaison from the board about the status of all aspects of the conference.
- Work collaboratively with the liaison from the PTO Board to develop a schedule for all key conference administrative items, and then honor that schedule, or communicate with the liaison promptly if that schedule will not be able to be honored.
- Organize special events, particularly ones incorporating the local community.
- At the discretion of the host institution, raise funds for and plan special conference events such as art exhibits, entertainment, idea exchange, etc.
- Identify and arrange for meeting facilities and residence hall/lower cost accommodations.
- Oversee, in conjunction with board, the conference Call for Proposals, including the receipt, review, response, and conference scheduling of workshops/panels/performances.
- Work with the board communications committee to disseminate necessary information to the membership about conference registration and the workshop/conference schedule. Provide communications committee information concerning travel and local resources for conference attendees' planning.

- Provide letters and other documentation for those who need formal documentation to apply for visas and other international travel permissions. The board can help with this by providing templates, or you may prefer to have the President or some other office write/sign the letters.

- Arrange and schedule conference volunteers for registration and information tables, as well as signage for conference areas. Coordinate all volunteer responsibilities and ensure volunteers know where/when/what they should be doing. When possible, host a volunteer orientation meeting before the conference starts. Generally we request volunteers provide 5-8 hours of service.

- Arrange for healthy food/beverages as needed for various events, particularly coffee in the mornings and lunch during conference days, as well as afternoon snacks during workshop days. Provide, in the conference packet, a list of nearby food options, including grocery stores.

- Arrange a sign language interpreter at least for keynote events if the budget makes that at all possible. Our past budgets have not allowed for sign language interpreters to be paid at their typical rates, but we have sometimes been successful at recruiting interpreters to serve on an honorarium basis, given the compelling cause of the conference.

- Arrange as many as possible in the way of available volunteer translators in languages you think are most likely to be needed. We recognize our budget does not always make this possible, but different local groups have found way to coordinate volunteer translators on the ground. The board is happy to help with this process, including providing a limited number of translation headsets.

- Provide local information packs for participants.

- Provide space for organizations to distribute their free materials.

- Coordinate with a local bookstore or book collective to make books and other relevant materials available for sale at the conference. Typically the local group coordinates with the bookstore on a list of titles they can offer that will appeal to the membership, depending on the scope of the bookstore’s capacities. You will also have conference attendees making contact to ask how they can have the books they have written themselves displayed at the conference, so someone on the local committee will need to facilitate their connection with the operators of the conference bookstore.

Conference Space and Housing Needs*

Based on attendance of 200-300
(Must be adjusted if 300+ people are anticipated)

**All conference facilities and housing must be as barrier-free as possible, and conference events and activities must represent the diversity of PTO membership. We value gender-inclusivity in dorm housing and other conference spaces.*

- **All-conference events**: Seating capacity of 250-300 (typically 3-4 all-conference sessions, in addition to a general membership meeting). This is typically an auditorium and should have the capacity for sound support, the showing of projections or video (in case they are requested by special guests).

- **Exhibit space**: Space to accommodate books and other materials shared by parties attending conference.

- **Conference registration**: Large, central space with tables and chairs for desk volunteers, including a table for any merchandise that may be available for purchase.

- **Breakout rooms**: 8 to 10 rooms needed for each schedule block. Conferences are typically divided into 3-4 blocks per day x 3 days (in addition to keynotes, membership meeting, and other special events). During each schedule block, there are typically 8 to 10 breakout sessions. These breakout sessions include workshops, panels, performances, and panel discussions. As many as 80-100 proposals for such presentations are typically accepted in order to provide diverse opportunities but also to keep attendance numbers sufficiently high for the conference to break even. Workshop breakout rooms should include space to move, and all breakout rooms should have enough isolation in terms of sound that the separate breakout sessions don't interfere with each other.

- **Pre/Post conference rooms**: Large space that can accommodate 50 or more people with ample movement area.

- **Entertainment**: Space as needed with capacity of 200-300.

- **Hotel rooms**: If possible, make arrangements for lowest costs with the possibility of up to four to a room for same price. We strongly encourage that you investigate which hotels in your region are not being investigated or protested by unions and other labor advocacy organizations—and then choose those. Given the content of our conference, our attendees do tend to care deeply about that. We recognize, however, not all areas will have the widest array of options on that score, so do the best you can. You will need to arrange a smaller block of rooms during the pre- and post-conference, a larger block for each conference night.

(For example, IF you were having three days of pre-conference workshops in addition to the typical 3.5 day conference AND you were going to end on a Sunday, you might imagine a Sunday night-Sunday night series of room blocks of the following numbers: 5-10-10-15-40-40-2, with the two nights of forty—or even those could ultimately be up to 60 if you think the location will be a huge draw--covering the Friday and Saturday nights of the conference.) However, you likely won't start with the full 40 (or even 60) rooms reserved on peak nights. Instead, once your conference dates are finalized please discuss with the recent previous conference chairs your strategies for room reservation before you sign ANYTHING; you will want to make sure you don't sign any contracts for too big of a block of rooms at the start. You will also want to discuss negotiation strategies. A standard hotel practice is to have you sign a contract for a room block that states that, if 80% of those rooms are not reserved by a certain date, PTO will be responsible for paying the balance of the cost to bring us to an 80% reservation. In other words, if too many rooms are reserved upfront, PTO will end up with an undue financial obligation. As a result, your early research should investigate which hotels will let you start with a smaller number (say 25 rooms on peak nights) but would have the capacity to bump up your block. You are strongly encouraged to negotiate for items like free internet access in both rooms and lobby as well as, if available, free continental breakfast. Remember to factor reservations for special guests (keynotes, featured workshop facilitators) into your room reservation blocks at the conference hotel. Even if for some reason your conference decides to go with a less traditional housing model (something besides a hotel), be sure that special guests have comfortable, well-appointed housing that reflects PTO's desire to be hospitable. For example, in Berkeley, special guests stayed at a comfortable (though not necessarily as fancy as past conference hotels) guest house with many of the same amenities as a hotel. Such an option worked well.

- **Dorm or free space**: Low-cost housing is very important for accessibility. It should not be prohibitively far from the conference, and if shuttles are necessary, they should be coordinated. If you believe strongly that the low-cost options for your conference will be particularly attractive, you may want to keep that in mind and calibrate your number of rooms in the hotel block accordingly.

- **Film series or other special events**: As determined by event type and anticipated. In the past we have had dances, special film showings, special local performances, closing parties, etc.

- **Shuttles:** If the housing is separate from the conference site, or if the conference site is very far from a major airport, we must ensure accessible transportation in the form of shuttles, etc. Those shuttles must be factored into the conference budget. Often you can partner with either the organization offering us space—or with other organizations—to provide shuttle service. For example, perhaps a local community organizing organization has a school bus they use to shuttle for events.

- **Insurance:** Be sure to learn about the insurance requirements of any spaces we use for the conference proper (except for hotels and housing accommodations; those companies should carry their own insurance). Ask the PTO treasurer for our documents reflecting our organizational insurance policy, and check with the organizations offering space to make sure that our insurance will be sufficient as is. If it will not be sufficient as is, make sure to enquire what aspects of insurance would need to be added and work with the PTO treasurer to acquire quotes.

CONFERENCE PLANNING SCHEDULE GUIDE

This checklist is ideally based on an 18-month planning calendar, but the conference can be planned in as little as 9 months if necessary (though this is not ideal), so just adjust the early steps of the calendar as necessary in order to catch your particular planning group up by mid-October. After October, we move mostly by named month designations because by then the majority of your deadlines will need to be the same whether your conference is in the early summer or the late summer.

EARLY STEPS (18 months out to 12 months out)

- Build partnerships.

- Find a host site for the conference (meaning for conference EVENTS).

- Ask the PTO board what your tentative available funds will be. (One of their representative should notify you, but if they don't, just email.) This does not mean you need to do an itemized proposed budget yet. That will come soon in the next phase. At this point, however, you'll want to find out from the PTO board what they anticipate would be the approximate total of PTO funds you will be authorized to spend to stage the conference. In recent years this amount has been in the neighborhood of 20,000 USD, but particulars have changed depending on location and circumstance.

- Run the site by the PTO board of directors, either by email, videoconference, or in person. Give them as much information as possible so that they can give you feedback about whether it will work.

- Investigate all your housing options. Discuss best deals. Consult previous planners re: housing.

- Determine who will serve in leadership roles: chairs, co-chairs, key liaison, etc. In other words, who will ultimately be responsible for making sure the conference happens, no matter how much committee support you (do or don't) end up getting?

- If you already know your dates, you can already be considering keynote guests or other facilitator special guests, soliciting input from the board, and then making invitations.

12 months out to 11 months out

- Find additional personnel--if other co-chairs, etc. will be helpful, necessary.

- Develop a committee that is as diverse as possible. Seek out committee members who will be dependable.

- Make your own chart of dates that takes this guide into account. Run it by board members—or at least the President--to make sure the deadlines are agreed upon. We will provide a few samples of charts, but we strongly suggest you not go by other charts but instead use those examples to make your own. You may need to include items other groups forgot, or your conference may have different goals and needs on the local level than someone else's will.

- Schedule a regular conference call with the board liaison (though they should reach out to do that.) Those conference calls will be more of a touchstone than this written guide, as more can be communicated that way and your questions answered more easily. Email is a wonderful tool, but don't let it completely replace videoconferencing or phone in your planning process. Doing so can leave you feeling isolated and can lead to misunderstandings about tone amidst the planners and the board members.

- Develop a budget for the conference based on estimates. See past budget examples in appendix. The President and Treasurer should be able to offer all necessary assistance. Share the budget with the board and give them a time frame (at least a week, ideally 2 weeks) to review the budget and approve it. The President and Treasurer will be the ones to ultimately communicate approval of the budget.

10 months out (or earlier)

- Discuss and designate division of labor and responsibility on your committee. Who decides what, etc.? Make sure everyone and everything is CLEAR.

- Discuss communication practices on your committee. For example, what's protocol for communicating with one another? What decisions require communication with whom? How will you inspire accountability without emphasizing perfection in a way that alienates those volunteering their time?

- Book your spaces for the conference events themselves, if you haven't already. (Hopefully this has happened much earlier) When you book spaces, inquire with the managers of each space about the nature of the insurance they require (IF they require any). PTO carries insurance, and you will want to compare our policy with their requirements to make sure that the coverage matches up. If the coverage does not match up, a venue may require your group to purchase additional insurance. If additional insurance were necessary beyond the scope of the PTO policy, you would need to factor the cost of that insurance into your total conference budget. The PTO Treasurer and President should be able to help you with insurance questions.

- Book room blocks at both hotel and low-cost housing, if you haven't already.

- Investigate your options for shuttles if you need them. Typically shuttles are only needed when your conference lodging is too far from the conference events for most people to walk (or if you have conference events at different locations). If you believe that the length of the walk will be okay for a majority of attendees, then you probably do not need to put into place a full-scale shuttle system for all, but rather just a small-scale shuttle system for those who request it as a result of their specific mobility status.

- Decide when your deadline for receiving proposals should be, so that you can include it in the Call for Proposals. The rest of the calendar should help you determine what the best deadline would be, but you are advised to also discuss that with previous conference planners as well. Your deadline should be NO LATER THAN January 5, and you may wish to make it sometime in December (for example: Dec 15). Though we do not advertise this externally, we always allow for a week or ten-days extension because the PTO community tends to procrastinate. As your local committee chooses its proposal submission deadline, be advised that you should be setting up a schedule that will allow you to notify everyone of acceptance or rejection by February 15.

- Draft a Call for Proposals (CFP), allowing time to present it to the board and ask for input. See below for more guidelines about what a CFP should do. Aim to have it sent out by 9 months before the conference or, if possible, earlier. For example, if you are planning for a conference at the end of May, release your Call for Proposals by absolutely no later than early October, earlier if at all possible. Obviously, it will benefit your process if you can complete some of these tasks even earlier than required.

- Invite special guests if you haven't already, so you can confirm and advertise them as soon as possible.

- CALL FOR PROPOSALS DESCRIPTION. Your planning group will need to generate a Call for Proposals, also known as a CFP. A CFP is a standard way for conference planning organizations—both in academia and the not-for-profit sector—to invite people to apply to share their work at the conference. The CFP is essentially one of the earlier press releases for the conference. It gives the basic information about where and when the conference will take place. Then it introduces that year's conference theme. In essence, the CFP says: We are looking for proposals that address x, y, z. The CFP gives interested applicants information about what a successfully proposed presentation might look like. As you will see from the examples of Calls for Proposals, typically they offer a few short reflections that help potential applicants imagine how to connect the theme to their own work in PTO or compatible fields. The most successful CFPs tend to include a list of follow-up questions that help make those connections.

A Call for Proposals must:
1) *Be accessible to a wide variety of readers*. Our serious emphasis on accessibility across a variety of populations is arguably something that distinguishes us from many other conferences with academic aims. For example, the most common feedback for the PTO Board to give the local planners is that the CFP contains too many words or theoretical concepts that might make it inaccessible to part of PTO's constituencies. That does not mean that the CFP should not be academically, intellectually, or theoretically rigorous. In fact, a CFP should be ALL of those things. Therefore, in this case, we're essentially asking you to identify any theoretical terms or job-specific jargon that might be—for whatever reason—not legible to all. Then just make sure that those terms are defined or made accessible by the writing in the proposal. Sometimes it's as simple as defining a term in other words right after you use it.
2) *Include the dates and location* of the conference.
3) *Explain the theme* of the conference.
4) *Include the list of different formats that conference presentations* can take, along with their explanations (See Appendix: you can request an electronic copy from the PTO secretary so that you can cut and paste it into your CFP).
5) *Include the DATE by which proposals are due*.
6) *Include the LINK to where proposals can be submitted*.
7) If known, *list any pre- and post-conference workshops and special invited guests.*

You will find examples of Calls for Proposals in the appendices.

9 months out or October (whichever comes first)

Why does this say "or October"? That's because, even if we have our conference later in the summer, these items should be handled by October, given that our conference "competes" for participants with other conferences who get their information out even earlier. In other words, if these items aren't publicized widely by October and ideally earlier, potential participants will likely go ahead and choose other conferences to attend with their limited money and other resources.

- Arrange with PTO's communication committee to open the Call for Proposals online form on a date that corresponds with the release of your CFP. Make sure that the online proposal is up-to-date, getting the information you need from the membership. Making these arrangements will ensure that the link you provide in the CFP is active and ready to receive people's proposals.

- Designate the method of delivery of proposals from the web mechanism that will collect them. In other words, how will they be retrieved by your committee in order to be organized and sent out for review? Will they go to a specific email?

- Designate (ideally in collaboration with the PTO board's web personnel) your method of organizing proposals when they come in. Currently they all come into a Google spreadsheet. How will master lists be kept, so that someone can always be aware of the status of each proposal (logged, sent out for review, reviewed, accepted/rejected/returned for revision)?

- Designate the person(s) who will be responsible for sending a notice of receipt to every person or group that submits a proposal. You will want to have this plan in place by the time you release the CFP, as some people may submit proposals almost immediately. Currently the web submission process automatically sends a notice of receipt to proposers. Do you want something else?

- Designate the plan for vetting proposals, including a point person for running the proposal vetting process for the local committee. That person will keep track of which local readers have been assigned what proposals, send them out for review, and keep a master repository of all reviews that are sent back. Board members are currently required to participate in proposal review, so you may not need a ton of local volunteers for this. Discuss best practices for vetting proposals with past conference chairs. A variety of rubrics have been used. See appendices. Typically at least two people (board members and/or local committee members) evaluate each proposal. The Co-Chairs can decide, with input from the president or other past conference chairs, how they will make final decisions about acceptance, rejection, or intermediate proposals that potential participants will be asked to revise.

- Discuss a scholarship timeline with the Scholarship chair, especially if special funds have been raised or donated to support local participant scholarships.

- Decide how your committee wants to handle requests for information, and carefully decide whose emails should be included in the CFP.

- Make a plan for who will actually answer which kinds of emails. There will be many, many emails.

- Have the board communication committee post your Call for Proposals on the website, and release it across as broad a network as possible: listservs, Facebook, Twitter, etc. Enlist the board to help you distribute the CFP. Do this in early October.

- Announce names of pre-conference and post-conference workshop facilitators online to generate word of mouth. Include dates of workshops, even if you don't have times or full descriptions finalized yet. These workshops often add value to the conference, convincing people who might be on the fence to submit a proposal.

- Finish any special guest selection and invitation that has not been completed. Collect their bios and any other information about their talk and get it on the website.

- Negotiate contracts with special guests so that all parties are clear about what labor and honoraria will be exchanged. The President and Treasurer should help you develop contracts, and the President should sign on behalf of the organization.

November

- Continue committee meetings.

- Continue circulating the CFP.

- Assist the designated web person and PTO secretary with answering ongoing questions, both online and on Facebook.

- Designate more specific jobs (food, donation soliciting, fundraising, hospitality, transportation, accessibility, program scheduling, advertising, registration chair, volunteer coordinator, liaison with community partners, etc.).

- Assign specific tasks to each person in each job/position, and make committee time to discuss and approve calendars/deadlines for each position. The first task assignments for most positions will likely involve research.

- Speak with the PTO Board to find about the board's current policy when it comes to the selling of advertisements in the program. Recently the board has begun to allow this IF the organizations in question relate to our mission, but each year's board might feel differently.

- If you haven't already done so, post the rest of the information about who will be doing pre-conference, post-conference, etc., along with bios. Let people know that registration for the workshops will begin when registration for the conference opens (which should be on February 15).

- Make sure you are creating as much other web content as you can to give people an idea that the conference will be worth their limited time and resources. The Board communication committee will help with this!

- Make sure all relevant bios of guests are listed, as well as workshop descriptions, etc. The sooner you can provide ANY information on ANY subject, the better.

- However, please be sure that a guest is fully confirmed before you post their info on the website. To be confirmed, a guest must have approved via email the following: amount of honorarium, schedule of appearance, basic content to be offered by special guest (title is allowed to be adjusted later), any hospitality and accommodations provided. Ideally a guest will have also signed the formal contract before you advertise them, but use your best judgment if the guest has confirmed in email (given that sometimes the mechanics of getting contracts scanned and signed can take a few additional weeks, and you may think it would be most effective to get their name on the website immediately).

- Receive proposals and begin to “bundle” them for distribution to readers. You can decide whether you want to stagger proposal reading, sending them out as you get them, or whether you want to bundle and send after the deadline. Use whichever method you believe will promote the best organization.

- Discuss travel arrangements with special guests so that you can begin to plan their flights--and factor those flights into your budget with more informed estimations. You can book domestic flights quite early if you wish to do so, but you must not book international flights until visa details are figured out. Discuss this more with Kelly Howe (or another person to be designated later) if you have questions about how to negotiate the delicate balance of planning international travel early but not so early that you’re in trouble with visa authorities.

- From where will they fly? And to where will the return? (Particularly with a well-known guest speaker, don’t assume that the person be planning for these two locations to be the same. Ask in advance to prevent misunderstandings.)

- Will they need visas? If so, what information or official documents will they need from you to help facilitate that?

- What kind of visas will they require? They might not even know this information because they might not have traveled to the US in this capacity before, so enlist appropriate PTO board members (one or two will probably already be designated) to help you investigate. If they have traveled to the US in such a capacity before, they can likely give you a place to start by telling you what classifications of visas they have had on past visits.

- Some visas require PTO to apply on behalf of a special guest; others require the person themselves to apply for their own visa. Will they be coming and going from the same place, or will their other professional bookings dictate that they fly in from one place or out from another? Factor this information into your budget.

- What other things would they like you to keep in mind if possible? For example, some special guests ask that you avoid sending them through certain countries that are inhospitable or even hostile to foreign nationals or particularly foreign nationals from specific countries.

- Please also be aware that, whenever you actually book flights, you should find out whether the travelers will require a transit visa in order to be on the ground in any countries where they might have layovers. Sometimes this can be avoided by just booking their layovers in countries that do not require such visas. You may wish to go through an official travel agency for complicated international fares; that way they can help you by checking out transit visa requirements, etc. Stay in communication with the board (and especially board officers) about visas. In 2012, for example, the President handled all of the visa issues and all international travel, so that such responsibilities were not shouldered by the local board. In other years, the local committee has sometimes handled more of these duties. Make an arrangement that works best for your committee, and clarify it with the board. Either way, the president MUST be involved with any visa-related paperwork.

December

- Continue committee meetings.

- Continue receiving proposals, and begin to vet them.

- Make sure any outstanding guest contracts are signed.

- IF your initial deadline for proposals is sometime in December, send out reminders about the upcoming deadline. Post on Facebook and elsewhere. Also, right before your deadline approaches, send out the announcement of your extension. Typically a 10-day extension works best. You may want to be aware of holy days for a variety of faiths as you schedule your deadline. Send the extension announcement through all the same channels you sent the initial CFP. Ask the board for help in circulating it. That short extension period will be the time when you get a huge number of your submissions, so it is STRONGLY advised that you allow for an extension.

- Check in with Scholarship chair to make sure you are all sticking with whatever calendar you all decided would be best for the scholarship application process.

- Have people in key planning positions report on progress, particularly when it comes to prices for food, shuttles, etc.)

- Begin to build an accessibility network (volunteer translators, volunteer sign language interpreters, etc.).

- Begin to make plans for how your conference program posters or publicity will be developed. Will it be designed by a volunteer designer? By college student designers? Will you hold a local contest? You of course don't need to have the cover completed by now, but a plan will be good.

- Continue planning for any complicated visa applications for guests, and work with appointed visa personnel from the PTO board to find out when the optimum time is for applying for the requisite visas. The best timing really just depends on the visa classification (and that depends on the country of citizenship of your guests and on the nature of their presentations).

January

- Continue committee meetings.

- Continue proposal vetting process. This is your single most important task in January: making sure that process is moving along smoothly and that you are on track to notify of acceptance, rejection, or requests for quick revision by February 15.

- Continue any lingering arrangements for guests.

- Continue any necessary coordination with Scholarship Chair to make sure that the timing of scholarship applications and conference acceptance notifications are lining up as planned.

- If your deadline for conference proposals was in January (many recent groups have waited until January), you should widely circulate information about an extension for those who wish to propose. Send that announcement through all the same channels through which you sent the initial CFP. Ask the board for help in circulating the announcement. If your initial deadline was January 5, January 15 would work well for an extended deadline. Be advised, however, that if your final deadline is January 15, you will want to make sure some of the proposals submitted earliest are being reviewed while you are waiting for that last batch.

- You will likely find that the feedback you are receiving from proposal vetters indicates that some proposals are "on the line," meaning that they could potentially be accepted if they were satisfactorily revised. Decide whether and how you want to send people feedback and ask for their revisions. In the last several years we have made every effort to mentor proposals, as doing so promotes accessibility and goodwill, but this decision is ultimately up to the local committee. Please feel empowered to ask PTO board members to draft feedback to proposals that need revision. The local committee does not have to shoulder that process on your own.

- Check in with PTO board visa personnel and advance as necessary. Be advised that you will may need to give PTO board visa personnel detailed itineraries for your international guests.

- If you have not done so already, begin to explore which local book provider might be a good fit to offer our "conference bookstore."

February

- Continue committee meetings.

- COMPLETE proposal vetting process. Send notifications by February 14 . (If there are a handful that you want to ask people to revise, it's okay to have a few of those provisional acceptances dangling at this point.)

FAQ about accepting proposals:

Q: How do we know how many proposals to accept?
A: We try to accept as many proposals as possible. The more people who are scheduled to present, the more guaranteed conference registrants we will have, so the number of acceptances has a very real financial sustainability effect. To figure out your total possible number of acceptances, take your number of available spaces for breakout sessions and multiply them by your number of available breakout sessions. In the past the conference has had 10 concurrent sessions (4 on day 2, 4 on day 3, 2 on day 4). If you have 10 breakout spaces and 10 sessions, you have 100 total sessions to program. Keep in mind, however, that 100 sessions doesn't mean 100 acceptances because each person/group who is allowed a double session counts as 2 sessions. Be sure to keep double sessions in mind when scheduling and calculating total acceptances. Because you will almost certainly have some attrition from the first round acceptances, you can either accept a few more proposals beyond the number you have room for, or just have a few people you might want to notify later as alternates if space becomes available after initial acceptances have gone out. Do not feel like you need to select poor proposals in order to generate funds, but DO feel inclined to accept absolutely as many proposals as you can while still maintaining the quality and integrity of the conference. FYI, if you ultimately have at least 80 sessions programmed (but that means you need to accept more than 80), you will be on track for a reasonably healthy conference. Aim for 90-100.

Q: What information needs to go into the acceptance email?
A: When you send notifications of acceptance, include AT LEAST the following:

--A request that the recipient read the whole email ASAP and respond by a certain date. (In that response they should: 1) confirm that they are still planning to attend and present, and 2) answer any questions posed to them about the proposal.)

--Confirmation of acceptance

--Name of proposal

--Name(s) of submission author(s)

--Format of proposal

--Any scheduling limitations that group listed, with an indication that those scheduling requests will be honored

--Notification of changes made in vetting process (for example, if something proposed as a paper panel seems like it would be more aptly described as a debate/dialogue, etc.)

--Any additional questions you have for specific presenters.

--An assurance that we will do our best to honor AV requests, but that we cannot promise.

--An assurance that we will notify people of the AV abilities in their assigned rooms in a timely fashion.

---*VERY IMPORTANT*: Explain that ALL presenters MUST register for the conference or at least the day they are presenting. Give a date by which they must register in order to be included in the program. Make that deadline at least two weeks later than the real date on which you must have that information. If you are notifying accepted presenters by February 15 as requested, anywhere between April 1st and April 10 would likely serve as a good registration deadline, depending on the dates of your specific conference. Include link to registration.

--Direct the accepted person(s) to any scholarship information available online. At this point the scholarship application process should be ongoing, so urge the accepted person(s) to apply.

--Offer a teaser in the form of a few exciting details about the conference. For example, you could remind about special events or recent features added to the schedule.

--Direct back to our website and Facebook page for more conference info.

--Give a specific conference email address for information requests.

- Make sure someone is supervising/keeping track of any proposals that need to be revised.

- Make sure someone is prepared to field the responses to the notifications of acceptance and rejection.

  Fielding includes:
  --Confirming on a spreadsheet when someone writes back and confirms their intention to attend (meaning their acceptance of our offer to present)
  --Indicating on a master list when someone writes back and says they can no longer present and wish to rescind their proposal.
  --Answering any general questions that are sent back in response to the email.

- Open registration for the conference on February 15.

- Continue any website updating, including adding more information about accessibility. All information about accommodation reservations must be included at this time (though it will ideally be posted before).

- Make food reservations.

- Begin making plans to translate the program and information packet materials into Spanish if that is at all possible. We understand that in some cases it might not be. Talk with the president about your specific situation. Seek help with the translation from the PTO board and also from local volunteers. If your conference is affiliated with a college or university, you may be able to get help with translation from students or professors in the foreign languages departments.

- If you are including advertisements in the information packet, coordinate with the board to pull together the information on pricing, etc., to make available to potential advertisers.

- Continue to solicit local donations.

- Keep building your volunteer list, including any volunteer translators and interpreters.

- Finalize information about the titles of keynotes.

- Check in with PTO board visa personnel and advance as necessary.

March

- Continue committee meetings.

- If you have not done so already, finalize an agreement with the book provider who will offer the conference bookstore. Make the information of that book provider available on the PTO website so that authors know who their publishers should contact if they wish to have their books displayed at the conference.

- Plan the schedule, including keynotes, the annual membership meeting (which should happen on the next-to-the-last day of the conference, in the afternoon or early evening), lunches, concurrent presentations, evening activities, etc. This process will include grouping the accepted papers into thematic sessions. Those themes may need to be vague given the breadth of presenters; just try to make them as specific and catchy as you can. In terms of how you envision the entire conference schedule, you and your group have some room to pursue your own inspiration. That said, you should be in touch with your PTO board liaison to make sure that you have all must-do events covered, regardless of the overall schedule structure you choose.

- By the end of March (but earlier if possible--at least if your conference is happening in May), notify people about their scheduled presentation time (and the AV that will be available in their space, if you want to take care of two tasks at once!). They might need that information to schedule their travel. Remind people that they WILL NOT retain that time if they don't register by the assigned date. Emphasize the importance of registration at every turn. Occasionally people will just not register, hope you don't notice, and show up at the conference planning to present. While we understand that such an approach might be happening due to severe funding problems, presenting without registering is not fair to those who follow the policy of registering. In addition, we offer scholarships, and many possibilities for local attendees to volunteer in exchange for their attendance.

- Work with the scholarship committee to provide them any information they need from your local committee to send out announcements of scholarship awards by the end of March (Early April for a later conference--meaning conferences happening past mid-June--can work as well).

- Work on any hospitality materials not gathered already: maps, lists of good places to eat, etc. Don't make copies until later, however, when you have a better idea of total registration numbers.

- Check in with PTO board visa personnel and advance as necessary.

April

- Troubleshoot scheduling. Many people will email you with additional questions and occasionally with requests for scheduling changes.

- Confirm all late additions to special guest list, making sure final information is up on the website.

- Remind accepted presenters that they must register if they haven't done so already. Give them an updated deadline--a HARD ONE--by which they absolutely MUST register to maintain their presentation's space and time slot. Decide on your real date--the internal one--on which you will begin removing unregistered presenters from the program. In recent years, we have tended to wait until the last possible second, meaning that we actually remove presenters only right before the brochure gets uploaded and to print.

- Finish gathering any remaining program text.

- Confirm any final food arrangements. Make sure that you have offered some context for attendees to indicate dietary requests and responded accordingly. If you have questions about what constitutes a reasonable dietary request, confer with your board liaison. In general, we assume people are asking for reasons that are not mere casual preference, and we try to honor all requests.

- Plan hospitality for guests, assigning specific people to be liaisons.

- Check in with PTO board visa personnel and advance as necessary.

- *If you are handling nametags:* Order badges for conference registrants to wear. Make arrangements for how you will print and assemble them. *If the board is taking care of nametags, ensure that the board has digital files of any images/posters you have created for the conference.*

- Touch base with any necessary instructions for special guests, including not only individual keynotes but also any panel guests. For example, if you have keynote panels, have you done all that is necessary to prepare/inform both panel moderators and participants?

- If your conference requires an official shuttling service between the sites (or between the lodging and the conference sites), finalize your shuttle reservations and plan. If you do not require a full-scale shuttle for all conference participants by this point your local committee should instead be devising a plan to provide shuttle services to the specific participants who indicate that they will require shuttles due to their personal mobility status.

May/June

If your conference is later than the end of May/beginning of June, you can stretch out these final tasks across May and June; if your conference happens in May, you will obviously need to complete these tasks at a faster clip.

- Make sure you have the most accurate record possible of which accepted presenters have registered and which have not. Remove presenters who have not registered if you have not done so already. If a particular presenter has contacted you and asked for an exception (examples: they are not getting paid until right before the conference or their country doesn't recognize PayPal, etc.) to the register-before-to-stay-on-program policy, it is at the discretion of the conference chair and/or treasurer to grant such an exception. If you do grant that exception, make a note of it so that the person will be asked to provide funds at the time of check-in at the conference. In some cases, we have even allowed presenters to pay half in advance and half post-conference.

- Make sure you are advancing the (limited) program production on a timeline that will allow you to have it completed and printed at least several days before your pre-conference begins. Allow time for mistakes both on your part and on that of the printer's. Allow time for the printer to generate a proofing copy so that you can check formatting. We have moved to digital programs but will print a few desk copies and a few copies in case attendees need a paper version.

- If you want to add any questions to the conference evaluations, communicate these to the board..

- Stuff folders with hospitality information.

- Finalize details about food delivery and set-up. Make any payments that are required ahead of time. Coordinate with the treasurer to determine how each of these payments will be made.

- Check in with special guests about last-minute travel needs.

- Hold trainings for local volunteers. Make sure they are all clear about what is expected of them in exchange for free registration. Typically we have compensated local volunteers with free registration for the conference itself, but we usually hold that a specified amount of volunteer hours must be completed in order to qualify for that free registration, usually 5 to 8 hours.

- Discuss with the PTO board how you will document the conference. For example, will you have a volunteer photographer (or more than one) who will document the entire conference? Or will you document the conference by having several people cover the all-conference sessions and then asking participants to document each other's sessions and send their photos to PTO? As you can imagine, there are multiple ways you can accomplish the task of making sure we have dynamic, fun photos to advertise our conference in the future.

- Coordinate translators for the conference experience (if your group has figured out how to provide them). In the past, typically translators have volunteered for specific slots and have been considered part of the volunteer corps whose labor is recognized with free registration.

- Make decisions about who will introduce whom during all conference sessions. Notify necessary parties so that they can plan to make an introduction in a timely fashion.

PRE-CONFERENCE WORKSHOPS

- Whether your pre-conference workshops and your conference are taking place at the same venue or not, provide a registration desk at the pre-conference workshops. Print out a list of those who have pre-registered for both the workshops and for the conference, and have it available at the table. Pre-workshop participants who are also participating in the conference should be able to get their complete conference packets at the beginning of the workshop. In other words, pre-conference workshop participants will be all done with the check-in process before the conference proper even opens.

- Allow for on-site registration for the pre-workshop (and post-workshops).

- Take care of set up and clean up for all workshop snacks.

- Have at least two people beyond the facilitator staffing the workshop. One can run errands if necessary; the other can be available in the room (or just outside it) to trouble-shoot problems.

AT THE CONFERENCE

Tips and Reminders

- Right before the conference opens, print the most updated copy of the registration list to make available at the registration desk as a “master document.” Also make available at the desk a master list of all volunteers as well as a list of all participants who still need to register. It’s a good idea to have at least one laptop (maybe two, both with functional internet access) at the registration desk. That way you can double-check items when attendees have questions, and you can take care of financial transactions for those who do not have cash or checks with them.

- If you have a last-minute program addendum (we have done this on many years), let the communication committee know. They can update the digital program instantly. Print a few paper copies to keep at the registration desk, and be sure that these are announced at the next all conference event.

- Make sure the introduction to the all-conference opening session provides people with all key information that is not listed in the program as well as any changes or updates.

- Have an easily identifiable registration desk, staffed with informed volunteers. A good rule of thumb is to aim to have at least three people assigned to the registration at any time (one board member to answer organization-related questions, one local planner to run other logistics, and one local planner or board member who is free to move about the building, delivering messages, trouble-shooting, and making any necessary announcements). Ideally you would have even more than three people available at the desk, however, and during key registration times you should have a minimum of six in order to move people through the process efficiently.

- The PTO Treasurer should provide a cash box and change, but it is a good idea to check in about this in advance with the current treasurer.

- Ensure there is a secure location to keep the cash box and other desk items when the desk is not staffed (during all conference events, for example).

- Open the registration early each day, as some presenters may be there early and have questions during set-up.

- Lunch should be served on any full days of the conference (typically two, but could be more if your model is different). Ensure that participants with specific dietary needs know how to locate their food (and don’t accidentally end up with the wrong food!).

- Your local group may wish to seek out snack donations so that you can have them regularly available. This is not required, though it does often promote excellent energy and spirit among participants.

- Designate someone to go around and ring a bell (or make some other sound) 5 minutes before each concurrent session block ends. Otherwise presenters often lose track of time. (Note, if your breakout rooms are spread out, you’ll need multiple people to do this so that everyone gets a 5 minute warning!)

- Do your best to have someone available to address technology concerns. In the most effective scenario, this person will be someone very well-acquainted with the facilities and their specific capabilities. *It is especially crucial that tech personnel be available for the all-conference sessions.*

- Make sure that those assigned to hospitality for special guests are always in clear communication with those guests. This includes airport pickup. All guests should know what to do upon arrival at the airport, and they should be picked up. Once at the conference, keynote guests should always be aware of how they will get to/from the conference.

- Use the beginnings of all-conference sessions to make key announcements.

- Make sure conference attendees are informed about the procedure for handing in conference evaluations.

AFTER THE CONFERENCE

- Oversee all post-conference workshops in the same manner as you did the pre-conference workshops.

- Make sure you check in with the PTO Treasurer to find out if there are any financial loose ends you still need to address. Turn in any final receipts.

- Alert the PTO board of all individuals and groups to whom you would like us to send official letters of thanks.

- Write up any learnings/tips that should be included in this document for future organizers. Pass these along to the board liaison.

Relax, and try to find a moment to be proud of enormous your job well done!!!!