Some guidelines and tips for TCS conference local organization

Abstract

This document aims to provide some guidelines and tips for the local organizers of TCS conferences. Most of the content is provided by David Kempe (USC), based on his experience from organizing STOC – as a result, you will see that the descriptions below assume that ACM and SIGACT are involved in the process. The material for online conference (Section 12) is primarily based on the input from Michael Hoffmann (ETH) who organized CG Week / SoCG in 2020. Towards the end, there is also some information on the general chair (Section 17) provided by Valerie King.

1 Overview of Tasks

As local chair, your tasks are roughly the following:

1. Work with the PC chair and other stakeholders on scheduling the conference dates. This should happen about 2 years before the conference. See Section 2.
2. Choose the conference hotel and sign the contract. Specify to ACM what they should negotiate for. Process starts about 1.5–2 years before the conference, finalized 1–1.5 years before. See Sections 3 and 4.
3. Create and get approved a budget for the conference. See Section 7.
4. Bring in sponsorship money for the conference. This typically happens about half a year or a little more before the conference. See Section 8.
5. Organize A/V and recording. Can start a year before the conference or later. Interacts with hotel contract. See Section 11.
6. Work with the hotel on the food choices. This also interacts with the contract negotiations, but final quantities will more likely be decided closer to the conference. See Section 4.
7. Work with RegOnline to set up and monitor conference registration, and help people as needed. Provide discounts or free registrations to invited speakers, PC chairs, volunteers, etc. See Section 9.
8. Put up local information on the conference web page as it becomes available. This will start as soon as the dates and hotel have been chosen, and will continue until the conference. See Section 10.
9. Possibly arrange for childcare at the conference. This will probably happen a few months before the conference. See Section 13.
10. If relevant, organize poster boards for the poster sessions. This will probably happen a few months before the conference. See Section 14.
11. Organize volunteers to help at the conference. This probably happens a few months before the conference. See Section 15.
12. Interact with invited speakers to ensure that free hotel nights and upgrades are efficiently allocated. See Section 5.
13. Organize miscellaneous items that will be needed at the conference. See Section 16.

2 Scheduling

In the context of organizing STOC (which is an ACM (SIGACT) conference), you will want to work with the PC chair, SIGACT chair, SIGACT executive committee, etc., to choose suitable dates. With the current TheoryFest format, the two natural models are Monday–Friday or Saturday–Wednesday. Some considerations that have been raised have been scheduling STOC after the end of the quarters even for quarter-based schools, and collocation with (or avoidance of time conflicts with) other conferences often attended by STOC community members. Another consideration might be whether a mid-summer date prevents students on industry internships from attending.

3 Choosing a Hotel and Negotiating

The process for choosing a hotel based on the experience of David Kempe is as follows:

1. You communicate the possible dates to the ACM's representative.
2. The ACM rep puts an RfP (Request for Proposals) to the national representatives of the major hotel chains, specifying the dates and area.
3. They submit proposals, specifying space, room prices, suggested dates (which may be different from what you specified), location, various other parameters.
4. These are collected in a Google Doc you have access to.

If you are not happy with the bids, the ACM rep can send another RfP. If you had specific hotels/locations in mind, the rep can directly contact them.

Be aware that STOC is a large enough conference that not too many hotels can accommodate it. Other conferences and events often start planning way in advance. In addition, if popular events (e.g., sports events, concerts) are known to be happening nearby, hotels may prefer to hold their inventory to sell it more expensively to people at those events, and may not bid. All of this is to say: start early!

Once you have determined one or more worthwhile candidates among the hotels, the ACM rep will negotiate with them and produce a contract. Before it gets signed, you (and ideally a few others, such as the SIGACT chair etc.) should look through the contract and make sure that everything is correct in it. At least for the year that David Kempe was organizing, there were a number of bad mistakes in the contract, at least some of which our SIGACT chair at the time caught in time. Do not assume that just because the ACM rep does this all the time, they will do it correctly.

Some of the important parts of the contract that are negotiated at this point:

- Prices for individual menu items, and Food&Beverage minimum. See Section 4.
- Room blocks and deadlines. See Section 5.
- Discounts on A/V and WiFi. See Section 11.
- Meeting Space. See Section 6.

Once the contract has been signed, you have very little negotiation leverage with the hotel, so make sure that whatever is needed for you to balance your budget is included at this point.

The business model for hotels is that they typically provide you the meeting space for free, but in return, the contract specifies that you get all your food from them exclusively; you also promise to fill a certain number of hotel rooms, and will probably go with hotel A/V.

Hotel food prices are quite high. The Food&Beverage minimum is an agreement that you will spend at least that much total; if you fall short of the total, the difference will be charged as rent for the meeting space.

Make sure to double check what the "total" refer to. In David's case, The total that is contracted is the total *before* gratuity and tax. This is a difference of 25–30%. This may cause you to accept an much higher mininum than expected. It will be a good idea to reach out to past organizers to get a ballpark estimate of the total food consumption price. Be very cautious about accepting any higher minimum; if attendance is lower than budgeted, you can bring down your food orders, but not below the contracted minimum. A bunch of dollar amounts in hotel contracts will have "++" behind them. This means that tax and/or gratuity (as appropriate) is to be added to the number.

4 Food and Beverage

By far the biggest expense for STOC is the food and beverage. This is an item you can scale based on attendance, but be aware of the negotiated minimum (see previous section); that minimum might be before gratuity and tax.

If you check out the hotel banquet menu that they will send you, you will likely be horrified at the prices. I don't know if those prices are meant to actually be charged — it's ACM's job to negotiate down the prices for some of those items and put them into the contract. The food that is typically provided at STOC includes:

- Breakfast every morning.
- Coffee breaks in the morning and afternoon. On the last day, an afternoon coffee break may not be necessary.
- A reception on the first night.
- Some reception-style food at the poster sessions, if your conference has poster sessions.
- Drinks, including beer, at the business meeting.
- Possibly lunch for some lunch meetings.
- (Long in the past, there was also a STOC banquet. But that hasn't happened in a while.)

One cautionary tale from David's experience: after the contract was negotiated, an additional lunch panel discussion was added, which needed sandwiches on a station instead of a plated lunch served by servers. The hotel was not willing to honor the $35 lunch deal, and insisted on charging us a higher rate for sandwiches on a buffet. The point of mentioning this is that it's important to figure out early what exactly you will need in terms of food, and negotiate good prices for that.

Speaking of sandwiches, most hotels also can provide "box lunches." In David's experience, they are usually even more expensive, and worse. A sandwich buffet is almost always a better deal.

Another interesting item is the reception. In David's case, while they negotiated a price, the contract didn't specify what foods would actually be served. The hotel then proposed cheese platters, raw veggies, and three types of appetizers. David's team ultimately upgraded that at a slight extra cost. The point here is that for something like a reception, negotiating a price without specifying what you actually *get* for that price seems useless. You may want to work that out ahead of time.

A third interesting item is coffee breaks. There are two options: one is to have specific coffee breaks, which presumably come with a given amount of coffee, hot water, etc. per person. The other is called "all-day coffee service," where you pay an amount per person, and the hotel will refill coffee and tea whenever it runs out. This option costs more per person. David has tried in several conversations with our ACM rep to figure out the business model here. What keeps us from just ordering — say — 10 of those "all-day coffee service" options (instead of 250–350, one per attendee), and then just running out very frequently, because a lot of people are sharing it. It is not clear to David where the hotel would draw the line if one orders, say, 100 of those "unlimited" options.

For all types of food orders, you're not bound to ordering one for each registered attendee. From David's experience, it seems that the default is the following, at least for receptions:

- At a minimum, they will bring out as much food as you ordered.
- If it runs out, they will bring out more and charge the conference for it.

However, you can tell them instead to not restock, so that you can budget more precisely. If you expect that about 200 people will show up for breakfast, you can just order 200 breakfasts, rather than one for each conference attendee. If you realize at the conference that you don't seem to have enough food at some events, you can always adjust the order size then, though hotels typically want to be told at least 24 hours in advance.

One rule that hotels seem to have: they will a priori not set up rooms for more than your largest food order plus 5% (or some such number). This is because they "assume" that at least for one meal, all attendees will show up, so why would you ever need more chairs? However, this seems something that is easy to negotiate, by telling them why we only expect about 3/4 of attendees to show up at any one time (or, in the case of receptions or poster sessions, why we expect people to not eat for one full person each). Also, one obvious workaround is to just order a larger number for one of the cheapest events (e.g., have 350 orders for the second day's morning coffee break).

At the reception, and possibly at the poster sessions, you will probably want to have a bar. One option is an open bar, i.e., the conference pays for all drinks consumed. Another solution is to just make it a cash bar, and have attendees pay for their own drinks. An alternative is to give them — say — one drink ticket for each event, or some fixed total number of drink tickets to be used at any event. The hotel will then charge the conference for the value of drinks that were purchased with drink tickets. However, for some types of events, they may also charge a one-drink minimum per person based on the size of the order.

Notice that at least for David's one sample data point, drinks purchased from the bar by attendees on their own dime count as "by our group," so they count towards the conference's total food&beverage expense. This is also something you may notice in the food order proposals the hotel will send you: in some documents, they will include just the food you are paying for, and in some others, they include their estimate of what people will actually be spending including drinks. You probably still want to check about such discrepancies, but this is useful to know ahead of time.

When you have bars, the hotel will likely charge you for setting up and manning the bar. This charge does not itself count as food&beverage, but as labor. In David's case, they were very quickly willing to forgo that charge.

For the business meeting, the drinks provided are typically soft drinks and beer. For those, our typical mode is that the hotel will put out the drinks, attendees take them, and the hotel charges you based on what is gone at the end. They might suggest a bartender, but you don't really need that for just bottles of beer. For the poster sessions, smaller snack foods are probably best.

5 Room Blocks and Free Hotel Rooms

ACM will negotiate a conference hotel room rate for attendees with the hotel. Typically, this negotiation involves agreeing on a size of a block reserved for attendees. If attendees do not fill a negotiated minimum number of rooms total, ACM will be charged for the additional rooms, even though they may still be rented out by the hotel.

Part of this negotiation is also a deadline until which the room block will be held for STOC. It seems natural to make this deadline coincide with the conference early registration deadline.

As part of the negotiation, the hotel usually commits to not having any lower rates available during the conference than the conference rate. This helps avoid having attendees try to get better rates by not reserving as STOC attendees. It should be in the contract.

Typically, the hotel will add some concessions with the room block. This includes things such as free upgrades, free room nights based on how many rooms have been booked, and reduced "staff" rates, as well as a few "welcome" amenities. The meaning of those are:

- Upgrades seem to be applied *per stay*. In David's case, they had total 5 upgrades.
- Free room nights are computed at a fixed rate: e.g., one free night per XX paid nights. You can distribute them arbitrarily over registered guests. It seems natural to use them on people who were promised full reimbursement, such as keynote speakers, to avoid the reimbursement expense for SIGACT.
- In David's case, the hotel offered four "staff" rooms. These were regular hotel rooms, but discounted 25%. They used such "staff" rooms on people who had been promised some financial help if needed. These are again computed per *guest*, so you can't use Monday–Wednesday for one person, and Wednesday–Friday for another.

In order to assign free nights or discounted nights to invited speakers, those speakers need to be staying at the conference hotel. Since the conference hotel may well sell out, it's important to have those speakers book at the hotel early, to avoid having to unnecessarily reimburse them for stays at a different hotel. This requires some communication between the local chair and the conference chairs in charge of inviting those speakers.

One useful thing David found out: the hotel is holding executive suites for the group. Once you decide to upgrade some attendees to those suites, that frees up their rooms. In David's case, the hotel had not preemptively sold those rooms, so they were able to accommodate some invited speakers last-minute. To make that work, you'll most likely have to put your speakers directly in touch with your hotel rep — because the rooms are being held for STOC, the front desk won't know about them.

6 Meeting Space

In terms of meeting space, you need to make sure of the obvious: having as many rooms of about sufficient seating capacity as there will be parallel sessions, and a way to combine rooms to give you a sufficiently large room for plenary talks. You typically communicate these needs to a representative from ACM for the RfP and contract negotiations. In addition, you'll want at least some medium-size room as breakout space, and a spacious foyer area for registration and booksellers.

Another consideration is the poster session if you have one. Depending on how much space the floor has, you might have additional rooms available, or reuse one or more of the session rooms or breakout space. The hotel will typically reconfigure rooms for you as needed for free, assuming there is enough time to do so. However, in David's case, when he inquired about reconfiguring the largest (300-seat) room into poster session space, he was told that that would come with an extra charge, because it would involve massive changes. Another consideration is the room size for poster session: while a small room is "cozy," the acoustics make it hard to have audible conversations with the poster presenters.

If you are planning to provide on-site childcare, then having another room of an appropriate size is the easiest solution.

The contract should specify that you have a complete hold on all the space for the entire conference. Make sure that it lists all rooms you want for the entire time period, and specifies an exclusive hold. Any room that is not written down in the contract may be given out to another group, and if that happens, there's not much you can do.

Most hotels have floor plans for all their meeting space online, and a list of how many people the rooms accommodate in various seating configurations. If this is not available online, then the rep can presumably send you the document.

There are a number of room configurations that will be relevant to you, and which you can easily find with a Google search, too:

- Theater seating: The standard at our conferences. Rows of chairs all facing the same direction.
- Classroom seating: Rows of chairs with tables/desks in front of them, all facing the same direction. This will primarily be relevant if you have some lunch events (e.g., lunch panel).
- Rounds: This is the kind of setup you'd have for lunch, and possibly in your breakout room. Large round tables with 6–10 chairs each (you can specify the number).
- Cocktail: Smaller tables, at sitting or standing height. You might use this for the reception (or part of the room), and possibly for the breakout room.
- Flow: basically empty space, which you will have in the foyer.

For each of the layouts, you can specify the number of seats/tables. As mentioned in Section 4, per default policy, they will not put more chairs in any room than the largest food order plus 5% or 10%. But you can probably tell them to bring that up.

7 Budget and Other Documents

In the case of STOC (or perhaps other ACM conferences too), quite early in the process, ACM will ask you to prepare a budget in a provided Excel spreadsheet. You can start from the previous year's and adjust various numbers. For many of them, e.g., number of volunteers, sponsorship, speaker reimbursement, etc., your numbers will be guesses.

The ACM document has a lot of rows that are irrelevant for STOC. There are a few things that are missing, or for which David felt he needed to make arbitrary choices: e.g., where to put childcare, and whether coffee breaks during workshops should go under "workshop expenses" or under "food." You get to play with the numbers, and can see how to balance various food orders. Make sure to update the gratuity and tax rates to whatever is negotiated with the hotel.

An interesting question is how to treat free registrations. They make the income not match the inner product of registration numbers and registration rates. The spreadsheet basically treats them as expenses (reimbursement of speakers, volunteers), but David finds this a bit complicated to deal with — e.g., where to enter the lost revenue from giving free registration to certain invited guests? It might be beneficial for budgeting purposes to simply generate a category "free registrations."

Early on in the process, you will need to submit a Preliminary Approval Memo (PAF) to ACM. It's not clear whether this is supposed to come from the local chair, SIGACT chair, Theoryfest chair, or someone else. This is accompanied by a requirements doc, which specifies how much meeting space you need, for what dates, how many attendees, etc. This is obviously needed for ACM to put out the RfP to hotels.

At the time that the contract with the hotel is finalized, you will be given an "exposure memo", which basically summarizes the conference's obligations, in terms of the food minimum, number of hotel nights we are promising to fill, penalties if we fail to do so, etc.

At some point along the way, ACM will also want you to fill out the Technical Meeting Request Form (TMRF). For this, you'll be entering basic information (dates, location), various people in leadership roles, as well as uploading a budget. You'll then sign various responsibilities about complying with and updating your budget, etc.

8 Sponsorship

Usual sponsors for STOC includes Microsoft, Google and IBM. You should reach out to past chairs and/or SIGACT committees to find out the names of contacts (and ballpark of past sponsorship).

A comment from David: I would also like to personally comment that in my opinion, fundraising should not be part of the local chair's job. There is nothing local about it, and as you can see from this document, the local chair already has a huge number of tasks to balance. Now that we have an overall "Theoryfest Chair" (or at least we did in 2018), either fundraising should be up to that chair, or perhaps there should be a dedicated "Sponsorship Chair."

A suggestion from David: If lots of resources are provided by your institution (e.g., you get significant adminstrative support for many things), then maybe your school could be listed as a sponsor as well.

9 Registration

In the case of STOC: registration is done via the RegOnline system. This is a pretty powerful system that allows you to do a lot of things, but has some complexities to figure out. Fortunately, the tech support person at RegOnline in David's experience was extremely competent and very quick to respond to any questions.

When you first work with RegOnline, they have two options: one is to basically copy over the previous year's setup and have you deal with the rest, the other is to have someone at RegOnline take care of the year's setup, which costs $500+. We've always chosen the free first option.

The main things you'll be doing in RegOnline are:

1. Adjust registration types and fees.
2. Test whether registration works.
3. Create discounted/free registrations for some people.
4. Monitor registration.
5. Cancel registrations and do refunds.
6. Print badges.

Many of these work fairly straightforwardly, though they sometimes involve clicking through a few different menus. Below are a few aspects from David which gave him some difficulty.

1. David recommends creating fewer registration types. Right now, there are separate registration types for early and late registration. Instead, one could just create one type for — say — "ACM member," (similarly for the others) and specify different registration rates for different time ranges, which is an easier way to achieve the same thing. It seems to David that you could still extract the number of early and late registrations this way (for the budget). There are advantages to fewer types — see below.
2. The system can interact with ACM's database to check ACM membership numbers automatically. However, it cannot do this for IEEE or SIGACT-only membership.[1] Unless you want to handle a handful of people who e-mail you because their member registration doesn't work, David strongly recommends in the future grouping IEEE with SIGACT. For those registration types, people can enter their number, but the system doesn't verify anything. David's hack for SIGACT members was to tell them to register as IEEE members.

[1] RegOnline may be working on this.

3. For that matter, David holds the view that perhaps, we shouldn't check ACM memberships, either. It's unlikely anyone will cheat here, but it is quite likely that some people will get frustrated if things fail to work, and not register at all in the end. There were some times when ACM's server was down, so ACM member registrations didn't work.
4. If you do have different early and late registration types, you will need to enter when they are available to people. Whether the cutoff dates were inclusive or exclusive can be confusing. If they are not matched, it could result to one day (the last day for early registration) when *no registration types* were available. The system let people register without a type and for free. Fixing this involved canceling a bunch of registrations, e-mailing those folks, and creating a discount coupon for them so they would still get the early rate. Make sure your cutoff dates work the way you think they do.
5. You may want to give a number of people (volunteers, PC chair, invited speakers, etc.) free registration, and might want to give some others discounts. You can generate discount codes easily. Notice that they are bound to a single registration type. When you see the registration rate for the type, click on "Advanced" — that's where you create codes, for which you can specify either an absolute or percentage discount, and the number of times a code can be used (e.g., once for each invited speaker). This is a reason to have as few types as possible. For instance, if you give all invited speakers a 100% discount on "early member" rates, and they register late, the discount will not work, and you'll need to generate one for "late member." Obviously, you can avoid some extra work by just having all of the free registrations be for "non-member."
6. The system has a fairly sophisticated simulation environment for testing registration, complete with fake credit card numbers you can use. However, even when testing, it will record the corresponding e-mail address. So if you use your own e-mail for testing, you'll need to completely cancel/delete the registration if you subsequently want to register for real.
7. There is a big orange "Host" button at the top. David couldn't find out what it is supposed to do, but it's not hosting the registration site. It deactivated all registration instantaneously when David clicked it during testing. Do not click it at the beginning of the conference in an attempt to "host" the conference.
8. When you are done designing the registration, the system allows you to generate HTML code for a button to put on the STOC page.
9. When you log into RegOnline, it takes you to an overview screen with all ACM conferences. There are two different search bars (one on the main screen, one in the "search" menu), and they don't seem to behave the same. When you do obvious searches like "STOC," they don't usually succeed. It's best to use the 7-digit number they give you.
10. The previous item is particularly relevant because RegOnline logs you out aggressively after about 10 minutes of inactivity, so you'll often need to log back in. I recommend always having a window open. Use the back button to navigate to a page that has a "regonline" URL with additional stuff after it. While you will be asked to log in again, at least it will take you back to the STOC page instead of the main page for all of RegOnline.
11. Some of the items you'll likely want to use frequently are the following:
    - Dashboard: shows you number of registrations, total registration revenue.
    - Registrant list: full list of names. By clicking on a name, you can cancel their registration, apply a discount after the fact (e.g., a speaker paid for registration before being told that they would get free registration), etc.
    - Event snapshot: gives you statistics on revenue, number registered for different types, etc.

- Agenda selections: allows you to estimate sizes of workshops, participations in panels, etc.
- The weird-looking symbol in a lot of menus is a filter, which allows you to filter registered people. One of the more useful ones is "All but canceled."
- The Email option allows you to schedule e-mail for particular times/days, such as reminders. It allows the standard filters, but not filters by agenda selections.
- If you want to send a more targeted e-mail, you run a filter under "Registrant List," and then use the E-mail button at the bottom of that screen.

12. Badges&Labels (under "Onsite"): allows you to design a badge or modify existing stored designs.[2] From there, you can print individual badges by entering the values for all required fields, or print badges for all (filtered) registered participants by clicking on the filter field. This will open a pop-up window, so it won't work if you have disabled pop-up windows. Obviously, you can filter, e.g., by people who registered in the last week (if you have already printed most badges before).

Starting in 2018, all STOC attendees are required to accept ACM's anti-harassment policy before they could continue with their registration. This was not hard to add, and will likely be copied over.

You will probably get a few cancellation requests from people who cannot attend due to various reasons. As far as I know, STOC never had an official cancellation policy, but it should. The local chair can decide a policy (e.g., last date of cancellation). Whatever you decide, you should post it on the STOC webpage, and it should perhaps also be shown on the final payment page in RegOnline. You will have to manually cancel registrations; the system also lets you generate additional charges (such as a cancellation fee) and send invoices for them — these are available when you click on a particular person's registration.

For on-site registration, the easiest solution is to just ask attendees to register through the website. You might want to provide a laptop on site for the purpose.

10 Web Page

You will typically put up a basic version of the web page early on with the most basic information, and then gradually add information as it comes in, such as program, deadlines, etc. Program content is generated by the corresponding chairs (PC chair, keynote talk chair, invited talk chair).

Among the things you'll probably put up on the web page are:

- Hotel information, Dates.
- Travel information.
- Local information.
- Hotel reservations, registration.
- Childcare information.
- Information on where and how to print posters locally.
- Additional information may be travel support, and visa information.

Also make sure to test the website on mobile devices.

[2] The system has pre-configured a lot of different brands of badge stock, so that it will print in the right format for each.

11 Audio-Visual and Recording

Aside from food, the next-biggest item (cost-wise) is the audio-visual equipment. At a minimum, each room will need a handheld microphone and a Lavalier microphone, connected to a mixer, amplifier, and speakers; in addition, of course, suitable projectors and screens (at least 8 foot). Make sure that the provider knows that you will need to reconfigure rooms to merge between parallel sessions and plenary sessions — this affects the setup. In particular, external providers may need more manpower to facilitate this.

In addition, in the case of STOC, there is a trend towards recording at least the STOC talks, and possibly some invited speakers.[3] For this, the minimal option is to record the audio with the slides; alternatively, you may want to also record video. If you do the latter, ACM seems to prefer that the recording has an inset of the slides inside a video of the speaker.

If you do video recording, you will almost certainly need a dedicated technician in each room, which obviously adds quite a bit of cost. If you do just slides, there seem to be different technological setups. One requires reconfiguration of output frequencies, but can adjust to more different types of laptops. With this option, you again need a dedicated technician in each room. The other fixes to a particular frequency, and will typically work just fine on its own, but you'll probably need to force speakers to use provided laptops to avoid problems.[4] In that case, you can get away with just one roving technician and volunteers. Make sure you specify carefully to the A/V company what exactly you need. (All of this is written as of 2018 technology. Perhaps, this is now different?)

Some of the "slide recording" devices will switch themselves off when they don't receive a signal for a while. This can happen during laptop switches, and even when you go into presentation mode (during the few seconds that the screen sometimes goes black). If you do recording without tech support, make sure your volunteers are checking that the recorder is still on.

For the generally low-tech setup at STOC, it's usually enough to have just one tech support person that you can get into a room if there's a problem. If you're trying to save money, you can also ask the A/V company to not schedule a tech support person during lunch breaks, and adjust the schedule to when you actually need them (e.g., 9:00–12:00, 2:00–5:30 instead of 8:00-6:00).

If you're going with the hotel A/V provider, the initial quote will likely be much higher. At that point, it helps to bring in an outside offer to negotiate them down. Outside providers are often quite a bit cheaper. The place where hotels can easily beat outside providers tends to be Internet, because they have the wired setup, while the outside providers need to go wireless.

The hotel contract (or A/V offer) will likely specify a fairly good rate on WiFi on the condition that you get A/V exclusively from the hotel — the ACM rep should probably negotiate this for you. The hotel might even give you WiFi free if one uses hotel's A/V. By comparison, an outside WiFi provider would cost much more on this front. Apparently, the common model for them is to bring several boxes full of cell phone chips and use that to set up a wireless network. If you get Internet through your A/V provider, they will likely subcontract the Internet to a dedicated provider, or you could negotiate directly with such a provider.

Another way in which the hotel will use its monopoly position to an advantage is by charging you for the time to "supervise" the external provider when they set up A/V. Make sure to add this cost in when you compare the providers.

In David's experience, the quote he got about video recording for 5 days of 3 parallel sessions was about

[3]Currently, we record those talks that have ACM Digital Library entries. Some invited speakers give us abstracts, and thus have an entry — we recorded those. On the ACM copyright release form, authors are asked whether they agree to be recorded. Those who opt out must not be recorded at all — it's supposedly not enough to record them and then just delete the recording. Some authors who marked "don't record" on their copyright release form might have done so by mistake or changed their mind. You may want to check in with them.

[4]Obviously, you shouldn't spring this on speakers unannounced — the PC chair will likely want to send an e-mail on your behalf a week or two before the conference.

$20,000. One may be able to bring this down a bit, but that's the ballpark. This includes the post-processing of the videos into individual files, adding an ACM STOC title, etc.

If you go very low-budget, you might end up doing this yourself. ACM has some specifications about minimum resolution, optimizing for web, having to show the ACM logo before each talk, etc., but these are easy to satisfy.

12 Online conference organization

This section is based on the input from Michael Hoffmann, who organized CG Week (including SoCG, Sympos. Comput. Geom) in 2020 as a online-only conference due to Covid-19 pandemic. This section discusses a few of the decisions made then and some further thoughts and observations that might potentially be helpful for organizing future fully or partially online events. Note that given that hybrid / online venues are evolving rather fast, there might be new or better options by now.

12.1 Live talks

We wanted to have as many talks as possible given live. A live setting is more interactive and more engaging, both for speakers and audience. The downside of a live setting is more unpredictability: Connections may go down, speakers may oversleep, go over time, etc. However, these issues are just part of an event, virtual or not, and we are used to deal with them. With careful planning and communication, risks can be minimized. During CG Week 2020, none of these issues were a factor.

12.2 Time Zones

A major problem with online events is that the participants are distributed over many different time zones. Specifically, for CG Week we have participants starting from Australia to all the way over on the west coast of America. There is simply no single time zone where these extremes can reasonably meet with those somewhere in the middle: 08:00AM PST corresponds to 05:00PM MEST and to 01:00AM AEST. This discrepancy is a severe limitation for the inclusiveness of virtual events for a global audience in general.

So we went with a compromise that targets the intersection of European and American East coast time-zones, with a live schedule from 02:00PM MEST to 08:00PM MEST. The morning sessions are still accessible to participants from most parts of Asia, while the afternoon sessions are accessible to participants from the West coast of America. On the one hand, our choice seems justified, as 241 out of 319 participants at CG Week 2020 were in time zones between GMT+3 and GMT-5, and 32 more in GMT-6. On the other hand, this observation is to some extent a self-fulfilling prophecy because people are more likely to attend if the schedule is convenient for them.

12.3 Talk Recordings

It is highly desirable to provide access to the talk and discussion contents in an asynchronous, on demand fashion, in addition to the live sessions.

As for the talks, the obvious choice is to record them and make these recordings available to the participants. There are different views on how to do that. Some prefer to have everything put on youtube, available to everyone and forever. But some speakers do not like this, and prefer to restrict the audience and/or limit the time of availability.

The content providers, in this case the speakers, should be able to freely decide and not directly or indirectly be pressured into making their talks more public than they want to. Therefore, we opted for a mode that we thought most if not all speakers would be willing to agree to: Videos available to conference participants only and only for two weeks, the week of the conference and the week after. Speakers could download their recorded talks, and then are free to make them available elsewhere, for instance, on their homepage or on any video platform of their choice, for as long as they want. Not too many speakers (less than 20) downloaded their video, though.

An inconvenience of providing the recordings is that one has to collect publishing agreements from all speakers. We asked speakers to download, sign and submit (via a weblink or email) a form. Most speakers did that, but a few did not. In some cases that may have been deliberate, but there are definitely some cases where the speaker did not read the instructions and then asked "Why is my video not there?" There is not much that can be done about it other than aiming for clear and concise instructions, and then hope that many people actually read them. :-)

12.4 Chat

Usually, the window for questions and discussions at the end of a talk is quite short. As such interactions are a central part of a conference, we want to enlarge their window beyond these few minutes. An easy way to achieve this is to offer an electronic chat platform. While every sensible video conferencing platform includes a chat function, these chats end when the meeting ends. Therefore, we opted to provide an independent platform for chats. An additional advantage of a persistent chat is that also participants who could not attend the live session can follow and participate in the discussion, for instance, after watching the recorded talk.

As chat platforms we considered Slack and Discord, and eventually decided to use **Discord**, mostly because (1) it also offers voice chat and (2) it has been used at EuroCG 2020 quite successfully already. The chat was very active during the conference, specifically on topics from the discussion forum and the business meeting, but also for a number of talks. Some few participants did not join the chat, which is unfortunate because they missed these opportunities for interaction. So, next time: Go, join, and use the chat! Such chat platforms provide very useful additional opportunities for interaction even in a classical conference setting. Therefore it seems worthwhile to consider them for any conference, virtual or not.

12.5 Video Conferencing Platform

To broadcast live talks and discussions one needs a platform. At least in summer 2020, the best such platform was Zoom. Compared to competitors such as, e.g., Microsoft Teams, Zoom has more features[5] and it is more accessible[6]. Software evolves quickly, so any detailed description of technical features and settings may become obsolete soon. Nevertheless, on the off-chance that it is helpful I will go over some of the Zoom configuration parameters below in Section 12.7.

12.6 Sessions, Hosts, and Chairs

Every Zoom meeting needs a *host*, which could be someone from the local organizers' institution. It makes sense to run every session of the conference in a separate Zoom meeting, with a dedicated host and a dedicated session chair.

In principle, the role of the session chair is very similar to the corresponding role in a traditional physical conference session: Announce speakers, handle the interaction between speaker and audience, make sure that everyone starts and ends on schedule, etc. However, the situation in a virtual meeting is a bit different and, for instance, nonverbal communication does not work quite as well. Therefore, it seems advisable

[5]e.g., in Zoom one can see more participants at once

[6]e.g., with Teams there are often authentication issues with Teams accounts from different domains, and Zoom can be run from any browser, whereas Teams only works from the client, Edge, and Chrome

to give specific, detailed instructions to both hosts and chairs about what their roles comprise and how to act in specific scenarios. (In fact, a number of chairs explicitly asked for such instructions.) In order to communicate about possible technical and administrative questions before and during the running session, setup a parallel “backchannel” outside of the actual session and system used. Only the speakers, chairs, and hosts of the session, as well as the organizers have access to this channel. At CG Week 2020 we used Discord for backchannel communication, with a separate channel for every session.

For reference, the instructions and checklists for Session chairs and for Hosts for CG Week 2020 can be found in Appendix A and B.

12.7 Zoom Settings

A free account allows to host only short meetings. So definitely a licensed account is needed. The capacity (number of participants in a meeting) is limited to 300 by default. So this parameter needs to be adjusted according to the projected participation (number of registrations), which costs extra.

On every account only one meeting can be hosted at any time. Therefore, several different accounts are needed for parallel sessions. As the next session(s) need to setup while the preceding sessions are still running, even more accounts are needed. In CG Week 2020 we had no more than two parallel sessions, hence we went with four different accounts.

The account owner can schedule the session meetings, but does not want to be around to start every single one of them. In order to allow a session host to start the meeting, they need to be made an *alternate host* for the meeting. (This is a different role than *co-host*.) Alternate hosts can only be chosen from the same account domain, which is one more reason to recruit the hosts locally.

Further Zoom settings include the following.

Waiting Room enabled, so as to give the session hosts, chairs, and speakers time and peace to setup

Require a passcode for each meeting to protect from unauthorized disturbances a.k.a. Zoom bombing; the password can (and should) be embedded into the URL, so the participants do not need to type it

Only authenticated users can join limit access to signed in Zoom users, again to protect from Zoom bombing

Join before host off (otherwise, you could get into trouble with someone joining a later or earlier session thereby starting the corresponding meeting and leading to error messages because there can only be one meeting on each account at any time)

Mute participants upon entry on

Co-host on

Screen sharing on

Nonverbal feedback and Meeting reactions on

Select data center regions check every region you have participants from, and disable the rest

Recording settings this may be a matter of taste, but I prefer to separately record “active speaker” and “shared screen” and nothing else. When viewing the video, one can then decide how to split the screen space between the two views, which is nice. In the standard “active speaker with shared screen” mode, usually the speaker view obscures part of the slides. If the gallery view is not recorded, listening participants should not be recorded unless they choose to speak up. Nevertheless, it is advisable to show the “agree to being recorded” disclaimer, to make sure everybody is aware of the recording.

13 Childcare

At STOC 2018, we tried for the first time to provide heavily subsidized childcare. More and more conferences (ICML, ACL, NAACL, Supercomputing, ...) are doing this. At SoCG (Sym. Comput. Geometry) childcare is now required to be provided. There are basically two natural approaches.

1. Minimalist: provide a space and vetted and insured babysitters, and some subsidy. Whatever entertainment or food parents want their kids to have, they need to provide.
2. Full-service: several conferences are now working with KiddieCorp, a national company that provides something resembling summer camp. They bring in staff members, lots of toys and activities, and have different exciting programs every day.

KiddieCorp requires a contract to be signed upfront, and they need to budget for a minimum number of kids, in the range of about 10. People who have had their kids at these said the kids really liked them. But if you get very little uptake, you might be stuck with a huge bill. The data from ACL/NAACL suggests that you might get about 1 kid per 100 conference attendees – this data might be outdated, and you probably want to check for more updated information. You might also check with larger conferences like ICML (potentially with more data to offer!) to see the utility rate of their childcare.

The minimalist alternative is to find a reputable company that basically provides you strongly vetted babysitters and the necessary insurance. The advantage is that you typically don't need an upfront contract, but can tell them on short notice how many sitters you need. It is also much cheaper — if you look carefully, you can probably get something for less than $30 per hour, which is very cheap when distributed over a few children. A little bit of conference subsidy can go a long way here.

To help you find a suitable agency, if you don't already have something in mind, David recommends e-mailing your local colleagues. Some departments/institutes will likely have worked with some agencies for their holiday parties or other events, and can give you recommendations.

In David's experiences, hotels are willing to let you use a room for babysitting, so long as the agency providing the service has the right state certifications and insurance. The hotel will provide you with a list of what they need. They might also have a list of agencies they recommend to guests or have worked with. Most reputable agencies will have all the certifications and insurance that are needed, but this means that you can't just bring in your neighbor's teenager who does a great job babysitting your own kids.

You will want to involve ACM in these discussions early as well. As official organizers of the conference, they have liability as well. It seems to David that if the agency satisfies all of the hotel's requirements, ACM is fine with it as well, and they mostly want to check that this is indeed the fact.

KiddieCorp and other agencies have guidelines on the number of sitters you will need as a function of the number of kids and their ages and special needs. They are not all the same, but in the ballpark.

One thing some conferences are doing now is to explicitly use childcare as a sponsorship opportunity. Rather than just listing a sponsor for the conference, some sponsors are listed explicitly as having sponsored the childcare subsidy (or even full amount). If you go with the expensive option, this may be an avenue to explore.

14 Poster Sessions

In the case of STOC, there are currently two poster sessions, on the second and fourth evening of the conference, typically covering the papers that were presented in the two preceding days. To entice folks to show up, there is food and drink.

You will need to ensure there are poster boards there. Hotels usually have a few small easels to put up boards, but those are more for posting programs etc. — they are not the size for research posters. Your department might have the right kind of boards. If not, there are a bunch of companies that rent them out. The hotel can probably recommend one, and you may be contacted by one or more as well; if not, a Google search will work.

You almost certainly will want to rent $4' \times 8'$ horizontal poster boards. Each such board will fit two posters on each side, for a total of four posters. When you rent the boards, they will probably come with pushpins, but you may want to check to be sure. You may want to get offers from multiple companies and gettng them to bid against each other – in David's experience, this signifantly brought down price of renting the boards.

In terms of labor, companies will often charge more for overtime labor, e.g., if you ask them to disassemble the posters immediately after the end of the second poster session, late in the evening. The obvious solution is to ask them to take down the posterboards the next morning, and similarly, to set up the boards early enough before the first poster session that it is in regular business hours. In David's case, as soon as he did that, they changed the charge to non-overtime rates, and said they'd still prefer to take down the boards the evening after the second poster session. Go figure!

You probably want the posterboards set up well in advance of the first poster session, so you can label them, and to give people time to set up their poster before going for dinner if they so choose.

You can check with the Poster Session chairs to see if they prefer a particular setup. As of now, there seems to be a preference to group posters by session in which the talk was presented, and perhaps group other posters together. (As of now, Theoryfest features some posters not connected to talks.)

If you need a bit more space, you can also typically attach posters to the walls of the room. Obviously, you want to check with your hotel rep first if that is ok. If you do so, you obviously don't use pushpins or normal tape — there is special poster tape that comes off without leaving any trace or taking off any wallpaper or tapestry. Your department assistant will probably have some.

While the posterboard is $4' \times 8'$, these are the outer dimensions, so the actual usable space is a little less, about $46'' \times 92''$. To have some gap between posters, this means that no poster dimension should exceed $45''$. In the instructions for poster sessions, we have been telling authors to limit the poster size to $36'' \times 45''$ or $45'' \times 36''$.

15 Volunteers

You will probably need a number of (e.g. student) volunteers to help out at the conference. The main things that need volunteers are the registration desk and checking for technical problems in the rooms.

For registration, obviously, the busy times are the first two days of the conference, when you probably want about 2–4 people at the desk. Make sure that your volunteers know how to print badges for those who register on site. If your department has a competent staff member they are willing to loan you for a few days, that can make registration much more smooth.

The other thing that volunteers will probably do is make sure that there are no A/V or recording problems in the sessions, and contact you or tech support immediately if there are. This is even more important if you record the talks using a minimalist slide recording setup — see the discussion in Section 11.

Volunteers typically get free registration, and in some cases, maybe also travel support (not relevant if you use local students volunteers). In David's case, they asked every volunteer to work for 2–3 half-days. In terms of numbers, they succeeded with 6 volunteers and one staff member from our department for the first four days (and a second for the first two days).

16 Miscellaneous

A few other items from David:

- As of STOC 2018, we post — and require attendees to check that they will abide by — the ACM Anti-Harassment policy. There is a committee working on additional suggestions to make STOC a more inclusive conference, and including those will be an important next step.
- STOC typically has booksellers from some of the major scientific publishing companies. They will likely contact you about the proper procedure. The default policy appears to be that they simply register for the conference (no other charges), and then make their own arrangements to get the books to the conference. You should know the number of booksellers and let the hotel know to provide enough tables in the foyer area.

  At the end of the conference, they usually take some of their books with them, and leave the rest for you to dispose of as you see fit.
- As local chair, you will need to print the program. Ideally, this should contain the STOC program, tutorials, workshops, and invited talks.

  During the conference, it's probably a good idea to post the program for the day visibly in a number of places, in particular, in front of each lecture room. Hotels typically have a number of easels you can use for the purpose, and they may have cardboard posterboards, or your department may have them.
- The local chair(s) and PC chair are the "authors" of the STOC proceedings, and in charge of the introductory remarks. These are completely standard, and you basically copy-paste most parts from past years. You will probably be asked to provide a picture of the city in which the conference took place.
- While this may be on the way out with Smartphones becoming more universal, it may still be useful to provide easy printing access at the registration desk during the last days of the conference, for people needing to print boarding passes or similar documents.

17 Some information on STOC General Chair

The SIGACT Executive Board picks a general chair. Among other things, the general chair completes a conference proposal and submits this to the ACM contact person. The ACM negotiates a contract with the proposed venue. As of December 2022, this is John Otero (otero@hq.acm.org) and Donna Cappo (cappo@hq.acm.org).

ACM Conference Planning Guide can be found here.

Request for Proposal and Contract updates can be found here.

A CG Week 2020 Guidelines and Checklists for Session Chairs (online)

At least 10min. before session starts: Be present and available in the virtual meeting room. If host is not there/meeting not running $\Rightarrow$ inform the conference chair (private message on Discord, e.g., [right-click] on name $\rightarrow$ Message).

During this setup time,

- briefly introduce yourself to the host and speakers,
- verify that backchannel communication with host and speakers works,
- check that all speakers for the session are there,
- if a speaker is not present, ask host to prepare prerecorded video (if available),
- ask if speakers are willing to take questions during the talk (if something comes up),
- inform them about the process ($\leq$17min. for regular talks, ..., see below).

During the whole session, leave your camera on if possible (if you experience bandwidth problems, dont; but it is nice for the speaker to see some human face in the audience, not just black boxes), but mute the audio when it is not needed.

At the beginning of the session:

- Briefly introduce yourself to the audience.

Just before a talk slot starts:

- Verify that talk recording runs (if not, remind host to start it),
- briefly introduce the speaker,
- if it is a student talk, remind the audience about it (and the BSPA), and
- if speaker refuses to take questions during the talk, let the audience know.

During talks:

- Manage time
- a regular talk is $\leq$ 17min., stop the speaker hard at 18min.; rest up to 19min. is for questions, then 1min. to change and introduce the next speaker $\Rightarrow$ Make sure that the next speaker can start on time. Discussion can always be continued in the chat.
- Watch the Discord chat corresponding to the session for questions. Decide whether to interrupt the speaker with a question (sometimes someone may answer in the chat directly but sometimes not), and what to collect to ask after the talk.
- Watch the participants on Zoom whether someone raises their hand.
- Ask host to eject participants if they behave inappropriately and/or disturb the session.

After talk:

- Thank the speaker and
- manage questions from the audience (as time permits). Possibly start with question(s) that were asked in the chat. Otherwise, check the raised hands. (Host helps to keep track of order via backchannel.)

- End discussion to start next talk in time.
- Verify that recording is stopped (if not, remind host to stop it).

After the last talk:

- Thank all speakers and announce the next session and when it starts.
- Say goodbye to the host (=¿ signal to end the Zoom meeting).

B CG Week 2020 Guidelines and Checklists for Session Hosts (online)

At least (and ideally around) 24h before the session: Check for backup videos. Download all for this session to the computer you will host the session from. View/check whether you can play the videos alright. Inform the speaker(s) about any problems, or let them know that it works.

At least 12min. before session starts: Start the the Zoom meeting, check that waiting rooms are enabled. Then be present and available in the virtual meeting room. If chair is not there at around -10min. ⇒ inform conference chair (Discord→#emergencies) and take over chair role until chair/replacement arrives.

During that setup time,

- setup backchannel communication with host and speakers,
- admit chair and speakers from waiting room (=¿ Participants panel),
- briefly introduce yourself to the chair and speakers,
- make chair co-host of meeting,
- check that all speakers for the session are there,
- if a speaker is not present, prepare to play prerecorded video instead,
- check if chairs and speakers microphone, camera on Zoom work, and
- check that screen sharing with speakers works.

Once setup is complete:

- Disable waiting room to let everyone join (Security → uncheck Enable Waiting Room and Participants → Admit All from waiting room).

During the whole session,

- leave your camera on if possible (if you experience bandwidth problems, dont; but it is nice for the speaker to see some human face in the audience, not just black boxes), but mute the audio whenever it is not needed.

Just before a talk slot starts:

- Make speaker co-host of meeting and
- start the recording.

During talks (and in general):

- Assist speakers with all technical issues, and watch the Discord chat for technical issues & questions from participants; answer them if you can.
- If speaker disconnects or connection becomes too poor—in agreement with chair—switch over to prerecorded video (if available),
- remind chair of “raised hands” if necessary,
- mute participants if they (may) generate background noise,
- eject participants if they behave inappropriately and/or disturb the session (both if asked by the host but also based on your own assessment alone).

After each talk, in the following discussion:

- Help host to keep track of order of raised hands (via list on backchannel),
- remind participants about wearing headphones and using proper microphones (if necessary because of poor audio quality or noise),
- mute participants after asked question (only if they forget to do so).

After talk (and the following discussion):

- Stop the recording and
- revoke co-host status of speaker.

After the last talk:

- Say goodbye to the chair and
- end the meeting (for all).