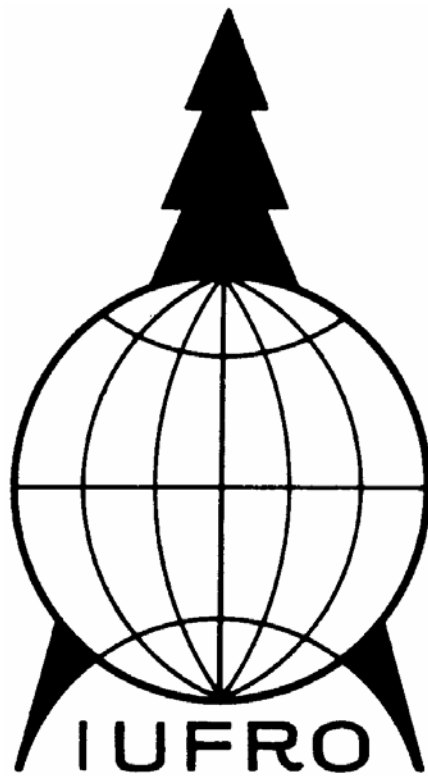


INTERNATIONAL UNION OF FORESTRY RESEARCH ORGANIZATIONS
UNION INTERNATIONALE DES INSTITUTS DE RECHERCHES FORESTIERES
UNIÓN INTERNACIONAL DE ORGANIZACIONES DE INVESTIGACIÓN FORESTAL
INTERNATIONALER VERBAND FORSTLICHER FORSCHUNGSANSTALTEN



PLANNING A CONFERENCE

*IUFRO Occasional Paper No. 3
Second Edition
Vienna, Austria 1995*



**International Union of Forestry Research Organizations
Union Internationale des Instituts de Recherches Forestières
Unión Internacional de Organizaciones de Investigación Forestal
Internationaler Verband Forstlicher Forschungsanstalten**

Planning a Conference

Second Edition
by Jacob L. Whitmore

IUFRO Occasional Paper No. 3

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E-MAIL: IUFRO@FORVIE.AC.AT

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The IUFRO Secretariat would like to extend its thanks to the Coordinator of IUFRO Division 1, Dr. Jacob L. Whitmore, for his dedication in revising this publication. The work was begun by Dr. Robert Z. Callaham, formerly Coordinator of Division 2 (1972-1981) and now Honorary Member of IUFRO; he first realized the need to collect all material that might be helpful in planning a conference. Now that computers have replaced typewriters, there has been a strong desire for updating this comprehensive documentation. Dr. Whitmore was prepared to commit himself to this task, for which he deserves our sincere gratitude.

We are aware of the fact that IUFRO organizes not only large conferences, but also an increasing number of small meetings for which only part of the compiled material may be needed. Further, some of the suggestions may not be relevant in certain countries, regions or cultures. Therefore it is left to the users' discretion to select the pieces of information that seem to serve their needs best. IUFRO may need to prepare a handbook to meet the specific demands of small meetings as well.

We wish all organisers of conferences and meetings the best of success; of course, we are always at their disposal with our communication and information services via telephone, telefax, e- mail and Internet server.

The IUFRO Secretariat

Foreword to the second edition

One of the main functions of the International Union of Forestry Research Organizations (IUFRO) is to conduct or cosponsor various conferences. The experience IUFRO has gained over the years in conference management is summarized in this manual for IUFRO division and research group leaders, and others who may find it useful. Not every suggestion offered in this document will be used for every conference, but this will serve as a general checklist.

This document updates one by R. Z. Callaham, based on numerous sources and published under the same name by IUFRO in 1980. Most likely we will need to update it again in a decade or two, using new experience gained in the waning years of the 20th Century and the early years of the 21st. Anyone who cares to contribute to that new version is urged to send their suggestions to the IUFRO Secretariat at A-1131 Wien-Schönbrunn, Austria.

J. L. Whitmore

Foreword to the first edition

This handbook offers detailed instruction on planning, organizing and carrying out a conference. It is designed to help the beginner as well as those more experienced. It lists the steps necessary to holding a successful conference. By following the step-by-step procedure, the conference planner can assure that nothing of consequence is left undone.

In preparing this guide, I searched a variety of sources. Most documents consulted were not sufficiently comprehensive, were dated, or were tailored to specific situations or organizations. The most helpful reference was the manual on conference planning issued by the Technical Association of the Pulp and Paper Industry, a trade organization in the United States. Of greatest value in preparing this guide were the records, reports, and experiences of many individuals who have organized successful conferences. This handbook, therefore, is a compilation of sound practices based on past experience. (...)

Robert Z. Callaham (1980)

1. Aims of IUFRO

- 1.1 Although this handbook was written for International Union of Forestry Research Organizations (IUFRO) conference organizers, it is general enough to be useful to organizers of any conference. The broad aims of IUFRO are to:
- promote international cooperation in scientific studies of forestry, forest operations, and forest products;
 - facilitate exchange of ideas among research workers;
 - create and maintain contacts among member organizations
 - encourage joint research and cooperation programs;
 - promote dissemination and application of research results;
 - cooperate with other national and international organizations;
 - introduce uniformity in nomenclature and standards; and
 - summon meetings, including excursions.
- 1.2 A conference is an effective medium through which these aims can be achieved. This handbook is a general guideline for planning and operating conferences.

2. Defining Conferences

- 2.1 For purposes of this handbook, the term "conference" means any type of meeting. Many terms are used to describe conferences with different formats, purposes, and characteristics (see section 12).
- 2.2 Conferences are of three broad types: functional or thematic, consensus building, and instructional.
- 2.2.1 At functional or thematic conferences, formal programs are presented. Congresses, symposia, conventions, and consultations fall in this category. These meetings usually are open to all who are able to attend.
- 2.2.2 The objective of some conferences (such as work conferences) is to arrive at a consensus. Attendance is often restricted to those whose consensus is needed or desired.
- 2.2.3 At instructional conferences, special business is conducted or paid instructors are used. Seminars, colloquia, short courses, training institutes, workshops, and clinics are examples of this type of conference. Attendance may be restricted to invitees or to paying participants.

3. Organizing, Sponsoring, and Hosting a Conference

- 3.1 A conference is organized by one or more of IUFRO's divisions, project groups, subject groups, working parties, or any combination of these.

- 3.2 A conference is usually sponsored jointly with member institutions, other organizations, or governments. Most sponsors provide financial or other resources for a conference. Some sponsors, such as IUFRO, provide other than monetary support, including their name, symbol, and experience.
- 3.3 The host of a conference is the sponsor providing the facilities.
- 3.4 The role, name, and symbol of each primary organizer, sponsor, and host should be clearly evident at all times.

4. Scheduling a Conference

- 4.1 Sponsors, as appropriate and necessary, approach a local institution, organization, or government to ascertain whether the particular aims of IUFRO can be met. Most important is the need to ensure that the scientific interests of IUFRO are not restricted. Any limitations, particularly on attendance, must be negotiated in order to achieve mutually agreed-upon conditions. For example, it is necessary to ensure that IUFRO members of all countries will be welcome to attend. Expressions of interest should be invited from all sections of IUFRO activities from which the conference is organized.
- 4.2 A conference committee is established, with the host and other sponsors represented. This committee is responsible to the host and sponsors.
- 4.3 The host and sponsors suggest the time, place, and facilities needed for the conference.
- 4.4 Conference committee members visit available facilities (see section 13) and report their recommendations to the sponsors on the basis of specifications for the conference.
- 4.5 Sponsors recommend dates and a venue to the appropriate bodies for decision (see section 14).
- 4.6 Conflicts with other conferences, particularly those of interest to potential attendees, should be avoided.
- 4.7 All conferences must be approved by the concerned bodies and sponsors (see section 14).
- 4.8 After approval, the conference committee secures written confirmation for the dates and place. If it is a IUFRO conference, the Divisional Coordinator should be given details after the date, theme, venue, and person in charge are decided. The coordinator then gives the information to the Secretariat for publication in IUFRO News.

5. Financing a Conference

- 5.1 Sponsors indicate, in writing, the funds and other resources that they will provide, and explain how funds can be used. This should be based on the budget proposal of the conference organizers.
- 5.2 All conferences for which registration fees will be charged should be operated according to a conference budgetary policy (see section 15).
- 5.3 Some sponsors, such as IUFRO, cannot be responsible for any debts incurred by the organizers.
- 5.4 The conference chairperson has primary responsibility for budgetary control (see section 15) and for the Conference Budget and Financial Plan (see section 16).

6. Organizing Committees

- 6.1 The conference committee consists of: conference chair, technical program chair, local arrangements chair, and representatives of the sponsors and host. Alternates and deputies may be appointed if necessary.
- 6.2 Subcommittees may be needed. Their functions, duties, and responsibilities will be defined by the conference committee or by its chairperson. Attendance and participation by chairs of subcommittees at meetings of the conference committee are at the discretion of its chairperson.
- 6.3 Often the technical program, local arrangements, and study tours will require separate committees for these purposes.

7. Conference Chairperson

The conference chairperson, who is usually an IUFRO official, has primary responsibility for the conference, and for its ultimate success. The committee should nominate a deputy to take over in case of emergency.

- 7.1 *Before the conference:*
 - 7.1.1 Announces the conference. There should be a form to be returned by those who wish a registration packet or further information.
 - 7.1.2 Calls meetings of the conference committee at timely intervals. If members are scattered geographically, electronic mail or teleconferencing may be useful for regular contacts.
 - 7.1.3 Guides and administers activities of the conference committee.
 - 7.1.4 Informs appropriate people of progress.

- 7.1.5 Develops and reviews the proposed budget and financial arrangements (see sections 15 and 16) with the conference committee.
- 7.1.6 Decides the number of complimentary registrations to be granted, and advises recipients and the local arrangements chairman of the names of the designated individuals (see section 15).
- 7.1.7 Prepares official functions with assistance of the local arrangements chair.
- 7.1.8 Arranges special presentations at official functions.
- 7.1.9 Issues appropriate invitations well in advance for official functions, and appoints someone to handle special participants.
- 7.1.10 Gives information about subsidiary meetings scheduled around the conference to the local arrangements chair.
- 7.1.11 If desired, appoints a conference evaluation committee to report after the conference.
- 7.2 *During the conference:*
 - 7.2.1 Represents organizers, sponsors, and hosts at the opening and closing sessions and at official functions.
 - 7.2.2 Presides at meetings of the conference committee.
 - 7.2.3 Presents awards to best scientists, hard-working organizers, cooperative local officials, etc.
 - 7.2.4 Informs the deputy of movements and duties.
- 7.3 *After the conference:*
 - 7.3.1 Thanks the sponsors, host, and special participants.
 - 7.3.2 Prepares a final statement of finances and reports summarizing and evaluating the conference.

8. Technical Program Chairperson

- 8.1 The technical program chairperson has the primary responsibility for the technical program and study tours—the single most important activity of any conference.
The technical program chairperson:
 - 8.1.1 Establishes the format of the technical program after analyzing the desired purpose and characteristics of the conference (see section 12).
 - 8.1.2 Solicits suitable presentations in liaison with the sponsors.

- 8.1.3 Prepares timetables for conference sessions and for study tours (see section 11).
- 8.1.4 Prepares and distributes a call and instructions for presentations of IUFRO papers, preparation of audiovisual materials, and posters (see sections 17, 18, 19, and 20). Clarifies the publications options when calling for papers. Ensures that authors understand that the conference document will be a preceding (available at the start of the meeting) or a proceeding (available sometime after the conference) published as a hardcopy and/or electronically.
- 8.1.5 Gives the local arrangements chair the names of presenters, their organizational affiliations, and addresses.
- 8.1.6 Periodically reports progress of the technical program.
- 8.1.7 Appoints and informs chairs and technical rapporteurs for sessions of the conference (see section 21).
- 8.1.8 Arranges previews of sessions and instructional meetings for session chairs and presenters (see sections 21 and 22).
- 8.1.9 Arranges review of manuscripts, posters, and visual aids for acceptance.
- 8.1.10 If preprints are requested, sends the properly prepared manuscripts to local arrangements chair by the deadline.
- 8.1.11 Arranges production of conference documents, reports, and recommendations required for the technical program through local arrangements chair.
- 8.1.12 Informs local arrangements chair about study tours (see sections 9.7 and 11.3.4), and selects knowledgeable, experienced individuals to organize and lead such tours.
- 8.1.13 Evaluates the technical program after the conference.

9. Local Arrangements Chairperson

The local arrangements chairperson arranges for all non-technical aspects of the conference.

9.1 *General Duties*

- 9.1.1 Prepares a checklist of all conference arrangements and procedures, and distributes copies to the conference committee, the hotel(s), and everyone who is arranging services.
- 9.1.2 Arranges all necessary personnel, services, material, and equipment required for the operation of the conference.

9.2 *Financial Management*

- 9.2.1 Coordinates a budget and financial plan with the conference chair (see section 16).
- 9.2.2 Appoints a treasurer and auditors for the conference, if necessary.
- 9.2.3 Arranges appropriate bank accounts and banking facilities, including exchange of foreign currency.
- 9.2.4 Prepares and distributes income and expenditure statements to appropriate conference officials and sponsors (see section 16).
- 9.2.5 Approves all invoices relating to expenditures and transmits them for payment (see section 15).
- 9.3 *Registration and Reception* (see section 23)
 - 9.3.1 Sends a registration packet with necessary information about programs, tours, fees, lodging, transportation, use of credit cards, program for accompanying persons, climatic conditions, appropriate clothing, and health/medical advice to all interested parties.
 - 9.3.2 Arranges for reception of participants at transportation terminals, hotels, or conference site, as appropriate.
 - 9.3.3 If participants are expected to travel alone from terminals to hotels or the conference site, provides details on routes, transfer points, usual costs, monetary exchange, etc.
 - 9.3.4 Arranges for registration before and during the conference. Collects registration fees, if any. Announces all fees well in advance, and includes payment instructions.
 - 9.3.5 Prepares preliminary, intermediate, and final lists of participants. Gives the preliminary or intermediate list of participants to all attendees early during the conference.
 - 9.3.6 Provides information desk, message boards, signs, name tags, and direction to postal, banking, and health services.
- 9.4 *Facilities* (see sections 13, 23, and 24)
 - 9.4.1 Obtains and assigns rooms and spaces for conference activities.
 - 9.4.2 Arranges assistants for each session to help the chair and to handle doors, equipment, and messages (see section 25).
 - 9.4.3 Provides assistants or instructions for use of equipment and services required for each conference activity. Provides audiovisual equipment, spares, and operators. (Note that American slide projectors (carousels) do not always accept thick-framed European slides, and that American and European video systems are not compatible.)

- 9.4.4 Arranges menus for group meals and special meals to comply with religious or cultural restrictions.
- 9.4.5 Arranges conference receptions and hospitality.
- 9.4.6 Prepares statements to hotel(s), restaurant(s), transportation, and other vendors.
- 9.4.7 Arranges security, considering the possibility of theft or demonstrations.
- 9.5 *Accommodations* (see sections 11.3.7, 11.4.4, 11.5.10, and 13)
 - 9.5.1 Reserves blocks of rooms for participants, preferably at a wide range of prices and close to the conference place.
 - 9.5.2 Operates a housing service or instructs participants on how to reserve housing. Has a travel agent available to confirm return flights or to change flights.
- 9.6 *Publicity* (see sections 11.3.5, 11.4.2, and 11.5.5)
 - 9.6.1 Establishes liaisons with press, radio, and television services.
 - 9.6.2 Supervises all publicity in accordance with a prepared schedule.
 - 9.6.3 Prepares news releases.
 - 9.6.4 Arranges and manages press conferences and interviews.
 - 9.6.5 Provides a room or desk space for members of the press.
- 9.7 *Study tours and special programs* (see sections 11.4.3, 11.5.6, 11.5.8, 24, and 26)
 - 9.7.1 Prepares budgets for study tours and special programs (such budgets shall be reviewed and approved by the conference chair before any financial commitments are made).
 - 9.7.2 Ensures that costs are kept within the budget and that any significant deviations have prior approval by the conference chair.
 - 9.7.3 Operates a registration desk for tours.
 - 9.7.4 Provides appropriate signs, tickets, and gathering places for tours.
- 9.8 *Conference reports*
 - 9.8.1 Completes reports on conference attendance, accommodations, and other details, for the conference chair.
 - 9.8.2 Evaluates local arrangements after the conference.

10. Documenting the Conference

- 10.1 *Several general reports about the conference should be prepared (see section 27).*
 - 10.1.1 The Budget and Financial Statement (see section 16) is a careful estimate of income and expense, and a controlling instrument. Actual income and expenses are compared item by item with the budget.
 - 10.1.2 The Conference Attendance Report tabulates the number of members and nonmembers, their respective job categories, and nationalities. Correct affiliations, mailing addresses, telephone and facsimile machine numbers, and electronic mail addresses for all participants are listed. Provide attendees with a list of participants early in the conference, as well as a final list after the conference.
 - 10.1.3 Conference Evaluation Reports are submitted to the conference chair by the evaluation committee and by the chairs for both technical program and local arrangements.
 - 10.1.4 The Conference Summary Report is prepared by the conference chair.
- 10.2 *Technical documentation:* Proceedings comprising full papers or abstracts should be published on paper and/or electronically.
 - 10.2.1 Proceedings and summaries should be distributed to all participants, appropriate documentation services, and the IUFRO Secretariat.
 - 10.2.2 Member organizations of IUFRO should be informed of the conference proceedings through IUFRO News and other means, and copies should be available upon request or for purchase.
 - 10.2.3 Descriptive reports of the conference should be sent to appropriate regional and technical organizations, sponsors, and the IUFRO Secretariat for inclusion in IUFRO News.
 - 10.2.4 All papers published or otherwise disseminated should include the identification "Presented at the IUFRO meeting held at...on...."
 - 10.2.5 Ownership of intellectual property and copyright, if applicable, should be stated clearly.

11. Implementing the Conference

- 11.1 The conference committee should prepare a timetable and checklist that includes times for decisions and for work to be started or completed, and that relates to all other timetables (see sections 17, 23, 24, and 27).
- 11.2 *24 to 18 months before conference:*

- 11.2.1 Review reports from previous IUFRO conferences, and seek counsel from organizers of any previous conferences.
- 11.2.2 Select conference chair and establish the conference committee (see sections 6 and 7).
- 11.2.3 Design the conference (see sections 12 and 14) including the technical program, study tours, social events, meals, special programs, and languages. Design and print conference letterheads with the IUFRO logo.
- 11.2.4 Select the site (see section 13) and tentatively reserve facilities, as well as simultaneous interpretation services if required.
- 11.2.5 Prepare conference budgetary policies (see section 15) and the budget and financial plan (see section 16).
- 11.2.6 Request participation by chairpersons, presenters, authors, editors, etc., and distribute timetables (see section 17).
- 11.2.7 Announce the conference to the IUFRO Secretariat, member organizations, and several technical and professional journals and organizations. Distribute mailing lists of potentially and actually interested groups (see section 27.1).
- 11.2.8 Start conference mailing list.
- 11.2.9 Report conference plan and organization to sponsors (see section 14).
- 11.3 *15 to 12 months before conference:*
- 11.3.1 Outline tentative technical program and timetable for sessions (see section 17).
- 11.3.2 Determine deadlines for preprinting technical papers (see section 27.1).
- 11.3.3 Call for papers and distribute guidelines for presenters (see sections 18, 19, and 20). Distinguish between invited and voluntary papers.
- 11.3.4 Assign responsibilities for local arrangements, study tours, and special programs (see section 26).
- 11.3.5 Prepare schedule of news releases, press conferences, etc. (see section 11.4.2).
- 11.3.6 Distribute "Detailed Proposal and Enrollment Form" to IUFRO Secretariat, member organizations, technical and professional organizations, and respondents to first announcement by using revised mailing list (see section 27.1).
- 11.3.7 Reserve facilities.
- 11.3.8 Decide preregistration and registration procedures and fees.
- 11.3.9 Establish bank accounts and signing authorities.

- 11.3.10 Invite special speakers, guests, and those requiring formal invitations. Determine if special speakers are to receive honoraria or travel expenses.
- 11.3.11 Often there are attendees who cannot participate without financial assistance. The conference organizers may wish to establish a fund to help these individuals. A solid source of funding for this purpose is key to success.
- 11.4 *9 to 6 months before conference:*
 - 11.4.1 Complete planning for technical program (see section 14); select chairpersons for sessions; complete titles of presentations; complete information on names, affiliations, and mailing addresses of presenters; inform chairs and technical rapporteurs for sessions.
 - 11.4.2 Review the publicity program.
 - 11.4.3 Decide on special functions, such as receptions, and how they are to be financed and arranged.
 - 11.4.4 Review accommodations and meeting facilities (see section 24).
 - 11.4.5 Obtain necessary approvals for the budget (see section 16).
 - 11.4.6 Distribute final information and enrollment forms to participants (see section 27.1), including details on anticipated weather conditions; airways, rail, and bus schedules to the conference; a road map; registration time and place; emergency telephone contact numbers; etc. Include critical material (name, address, 24-hour telephone number of the meeting place and organizer's office) printed in the local language. Some participants may need this information when seeking help from taxi drivers, etc.
 - 11.4.7 Select participants to be supported by conference funds.
 - 11.4.8 Report to sponsors.
- 11.5 *4 to 2 months before conference:*
 - 11.5.1 Review and adjust budget (see section 16).
 - 11.5.2 Revise and print technical program (see section 27.1). Make final arrangements for financial and simultaneous interpretation services.
 - 11.5.3 Inform chairs, technical rapporteurs for sessions (see section 21), and presenters of their place in the program (see section 22).
 - 11.5.4 Complete manuscripts (or abstracts, if only these are to be published), approve for publication or preprinting, and submit according to schedule.
 - 11.5.5 Review conference publicity and draft press releases.
 - 11.5.6 Decide final details for all special conference functions.

- 11.5.7 Request biographical information for introductions and synopses of papers for publicity (see section 22).
- 11.5.8 Establish final details of local arrangements (see sections 23 and 24), study tours, and special programs (see section 26).
- 11.5.9 Recruit and instruct assistants (see section 25).
- 11.5.10 Upon receipt of preregistrations and reservations, start preliminary list of participants (see section 23).
- 11.5.11 Assemble registration materials (see sections 23 and 27.1) and registration packets, including local maps.
- 11.5.12 Report to sponsors.
- 11.6 *1 to 2 months after conference:*
 - 11.6.1 Complete conference budget and financial statement (see section 16).
 - 11.6.2 Complete conference evaluations.
 - 11.6.3 Complete summary report of the conference.
 - 11.6.4 Distribute proceedings or principal papers to appropriate documentation services and IUFRO Secretariat.
 - 11.6.5 Send thank you letters to hosts, sponsors, and other key people and organizations, including those involved in the excursions.

APPENDIX A

Conference Organization

12. Conference Design

(See sections 2.1, 8.1.1, and 11.2.3)

- 12.1 Objectives, potential audience, subject matter, and expected results should guide the meeting format and design.
 - 12.1.1 If the objective is to provide many people with well-developed information, then the format should allow "few" to address "many." A symposium, usually the format selected, minimizes interaction between speakers and audience, even with scheduled time for audience participation.
 - 12.1.2 If the objective is to arrive at a consensus about any subject, then the format should maximize interaction between attendees. A work conference is one example.
 - 12.1.3 If the objective is to train participants in well-established procedures, then institutes, workshops, or clinics should be selected.
- 12.2 *Conference formats*

Format	Used For	Characteristics
<i>Congress</i>	Periodic meetings; information giving but not for policy decisions or agreements	Usually international; general and technical sessions and committee conclusions, or proceedings.
<i>Convention</i>	Regularly scheduled, periodic meetings; information giving and voting on official business; policy decisions or agreements	Usually national; general sessions and committee meetings; may use subgroups within general sessions.
<i>Consultation</i>	Official meetings of specialists, often invited by name; gathering and using experts; generating recommendations.	General sessions; prepared addresses or position papers, special invited papers or technical reports, and material from working groups.
<i>Symposium</i>	Giving technical information.	Prepared addresses by individuals or panels; discussion by panels and audience; published summaries or proceedings;
<i>Work Conference</i>	Planning, fact finding or problem-solving; recommendations, agreements, and policies.	General sessions and face-to-face groups; intensive audience participation; syndicate reports.
<i>Institute</i>	Training by a permanent staff.	General sessions; some face-to-face groups; staff provides most

<i>Workshop</i>	Training.	resources. General sessions and face-to-face groups; participants are resources and learn through "doing".
<i>Seminar (Colloquium)</i>	Sharing experiences; giving and discussing information.	Usually face-to-face groups; leader is discussion leader, not only content expert; usually limited attendance. Colloquia have teams of speakers while seminars have one.
<i>Clinic</i>	Exploring some particular subject; examining what happened; seeking solutions.	Usually face-to-face; some learning by doing; all participants have experienced or are familiar with a similar situation.

12.3 *Design Techniques*

Various presentation and interaction techniques can be used in the foregoing formats.

12.3.1 Keynote speakers

Keynote addresses, scheduled early in the program, set the stage and challenge participants.

12.3.2 Formal presentations with audience participation

In the classical symposium approach, formal presentations are either invited or contributed. Symposia avoid interaction among speakers, whereas panels allow interaction among speakers. Usually, some time is provided after each presentation or series of presentations for audience discussion. Interaction among audience and speakers is usually constrained because of time. Presentations may be keynotes, position papers, or reports of results. Forms of presentation vary from oral, to oral plus audiovisual aids, to unaccompanied films.

12.3.3 Formal presentations with formal response.

One or more formal papers are followed by a "critic," "discussant," "respondent," or an audience reaction team. Responses are arranged in advance to provide a range of viewpoints. Respondents should receive advance copies of the papers, and presenters should follow the prepared text.

12.3.4 Alternatives to sequential presentations ^{1, 2}

12.3.4.1 Select a person other than the speaker to deliver a 5-minute summary of the most important ideas in the written talk. The deliverer should be selected for speaking

¹ Adapted from Coleman Finkel. 1976. *Professional Guide to Successful Meetings. Successful Meetings Magazine*. Philadelphia, Pennsylvania. 182 pp. illustrated.

² Nadler, Leonard, and Zeace Nadler. 1993. *The Conference Book*. Gulf Publishing Co., Houston, Texas, 267 pp., illustrated.

ability and familiarity with the topic. Both the expert and the deliverer can participate in the question period.

- 12.3.4.2 Select a person with a good speaking voice to read the paper written by the expert. For the question period, arrange a telephone hookup to the office or home of the author. Questions to the author and the replies should be audible over the sound system in the meeting room.
- 12.3.4.3 Ask the presenter to send in advance six questions related to the paper. The chairperson should ask these questions of the presenter. Many presenters are far more relaxed in answering questions in this fashion.
- 12.3.4.4 Arrange the room using round tables. Send preprints to participants and assign a chairperson to each table to lead discussion and to bring questions for the presenter to the session chair.
- 12.3.4.5 Initiate with several reporters interviewing an authority.

12.3.5 Panels and forums

Panels establish two-way communication on a clearly defined subject during general sessions. The classic panel is comprised of three or four well-versed individuals, with divergent views on the assigned subject. Panelists must be chosen carefully to present a balanced discussion or to reach the desired conclusion. They concisely present and discuss their views, but do not give speeches as in a symposium. A moderator leads the panel through an interaction period. If the interaction period involves the audience, the panel becomes a forum. Among the variations to the classic panel format are these:

- 12.3.5.1 Appoint a "reactor" panel of about four members to respond to presentations of one or more resource people.
- 12.3.5.2 Break an audience of fewer than 50 into groups of about 10 for brief discussion and preparation of questions.
- 12.3.5.3 Structure the panel as a debate.

12.3.6 Concurrent sessions

Concurrent sessions permit diverse presentations to a large heterogeneous audience. Each session should be limited to a well-defined subject area. Sessions of interest to the same audience segment should not be held concurrently.

12.3.7 Pre-conference work groups

To summarize what is known about a subject or problem, working groups of experts can meet in advance of the conference. A summary report is presented at the conference for recommendations or for further action that should challenge the conference by presenting alternatives.

12.3.8 Conference work groups

Participants meet in groups of 8 or 10 to generate ideas, react, solve problems, plan, experience something, or to determine facts. Accomplishment of an assigned task, not discussion, is the purpose. If attendance is large, a few participants are designated as the working group and others as observers. Groups usually give interim or final reports to plenaries.

12.3.9 Post-conference work groups

Tasks needing further work after adjournment can be assigned to work groups. Various views encompassed at the conference should be represented by members. Tasks might include recommendations, a final report, or an action plan.

12.3.10 Training groups and exercises

The most effective size for a training group is 15 to 25 trainees to enable participants to learn new facts or methods. Training programs must be designed and tested well in advance of use.

12.3.11 Discussion groups

Discussion groups increase understanding of a subject. In contrast to work groups, they do not result in a product. In contrast to training groups, they explore rather than learn.

12.3.12 Temporary conference groups

Another technique for informing, getting reaction, and increasing face-to-face interaction is by temporary conference group. Two or three representatives from each permanent conference work group reform in temporary work groups. Representatives report on progress of their group and seek reaction.

12.3.13 Lectures

Lectures are longer and usually cover a broader scope than formal papers. They are essentially a verbal discourse given to an audience without a formal paper.

12.3.14 Limiting attendance

A design technique to improve conference quality is to select only people who can contribute specifically to the objectives.

13. Site Checklist

(See sections 4.4, 9.4, 9.5, and 11.2.4)

13.1 *City and State*

13.1.1 Name and location

13.1.2 Weather and climate

13.1.3 Names, titles, addresses, and telephone numbers of local personnel

13.1.4 Transportation possibilities:

- airports
- railways
- buses
- autos

13.2 *Meeting and office space*

13.2.1 What are numbers, capacities, and costs of rooms for:

- plenary sessions?
- working groups?
- posters?
- exhibits?
- offices?

13.2.2 Is ventilation, heating, or air conditioning adequate?

13.2.3 Where are telephones located? Where are faxing, copying, and electronic data processing facilities located?

13.2.4 Are washrooms and toilets adequate, at conference and office locations?

13.2.5 Are reception and registration spaces adequate?

13.2.6 Where are cloakrooms located? When and how are they staffed?

13.2.7 Any restrictions on access to buildings?

13.2.8 What are the business hours?

13.2.9 Is lighting adequate and controllable?

13.2.10 How far are hotels, transportation, recreation, restaurants, shopping, etc.?

13.2.11 Is space needed for delegations or special groups?

13.2.12 Where is parking? Is it adequate?

13.2.13 What health services are available? Where?

13.2.14 Are floor plans available?

13.2.15 Is there a bulletin board where daily bulletins can be displayed?

13.3 *Accommodations*

13.3.1 Are dormitory facilities available?

13.3.2 What hotels and motels are available (at a variety of price levels)?

- 13.3.3 Are costs reasonable? Are there inexpensive facilities for students or other attendees who need them?
- 13.3.4 Who handles reservations? How?
- 13.3.5 What are the methods of check-in, checkout, and payment?
- 13.3.6 Are there provisions for late arrival, early departure, or short stay?
- 13.3.7 What are the bath facilities—tubs, showers, and so forth? Private or common?
- 13.3.8 Are pools, saunas, or gymnasia available?
- 13.3.9 What are safety indicators? Is walking safe at night?
- 13.3.10 Are there facilities for smokers, disabled people, or those with special religious practices?
- 13.4 *Participation*
- 13.4.1 How many participants, observers, or exhibitors are expected?
- 13.4.2 What countries may be represented? Are there any restrictions?
- 13.4.3 Any special food or lodging considerations?
- 13.5 *Eating facilities*
- 13.5.1 Is there a cafeteria? Snack bar?
- 13.5.2 What are the business hours?
- 13.5.3 Can sections be reserved for conferees?
- 13.5.4 How far are the eating facilities from the meeting place and hotels?
- 13.5.5 Are meal costs reasonable?
- 13.5.6 Are beverages available for sale? Where? When?
- 13.5.7 Will there be mid-morning and mid-afternoon breaks? Food/drink available? Financed how?
- 13.5.8 Is smoking discouraged?
- 13.6 *Supplies and equipment*
- 13.6.1 What is availability of:
 - podium?
 - video player? American, European, or other system?

- microphones and recording equipment?
- chairs for meetings and lounging?
- tables for registration, documents, etc.?
- tables or desks for meeting rooms?
- pads, pencils?
- carafes, glassware, and cups?
- blackboards, whiteboards, chalk, pens, erasers, easels, bulletin boards, screens, 35-mm slide and overhead projectors?
- places to display flags?
- simultaneous interpretation facilities?
- telephone lines?
- Facsimile machines?

- 13.6.2 Are workstations available? Word processors and software (what types)? Modems? Printers? Are special keyboards needed?
- 13.6.3 What kinds of reproducing machines are available?
- 13.6.4 Are there spaces available for documents and mail?
- 13.6.5 What are rental prospects for needed items?
- 13.6.6 Is electricity adequate and available for duplicators or other machines? Are electrical outlets conveniently placed and plentiful? Voltage?
- 13.6.7 Is repair service available for duplicators, projectors, etc.?
- 13.6.8 Are local moving companies available for heavy equipment?
- 13.6.9 Is there a loading dock or receiving platform?
- 13.6.10 Are elevators large enough to take the largest equipment boxes?
- 13.6.11 Are doorways between the loading dock and the setup area large enough for oversized cases, such as interpreters' booths, mounted on a dolly or hand truck?
- 13.6.12 Is freight handling equipment available at the site?
- 13.6.13 Can telephones be installed in necessary offices? At what expense?
- 13.6.14 Are public telephones available in the meeting area or nearby? If not, can they be installed?
- 13.7 *Services available*
- 13.7.1 What visual aids are available or needed?
- 13.7.2 What signs are available or needed for doors, offices, meetings, exhibits, etc.?
- 13.7.3 Is a sound engineer available?

- 13.7.4 What cleaning service arrangements are available?
- 13.7.5 Is a photographer available for press coverage?
- 13.7.6 When and where are banking services available? Can currency be converted?
- 13.7.7 What laundry and dry cleaning services are available?
- 13.7.8 What are travel services for airlines, trains, rental cars, etc.?
- 13.7.9 Are audiovisual services available on an emergency basis?
- 13.7.10 Are taxi and bus services available? When, where, and at what cost?
- 13.8 *Personnel*
- 13.8.1 Are local people and specialists available for hire? What are prevailing costs?
- 13.8.2 What personnel will be required, such as typists, messengers, reproduction operators, drivers, receptionists, bilingual typists, interpreters, and translators?
- 13.8.3 Can a university, hotel, or others employ and pay local personnel, and bill for services rendered?
- 13.8.4 Are there local holidays that might conflict with conference or tour dates?
- 13.9 *Tourist or convention bureau*
- 13.9.1 Can help be provided before and during conference?
- 13.9.2 What information materials are available?
- 13.10 *Local arrangements committee*
- 13.10.1 What is the availability and schedule of cinemas, opera, concerts, gymnastics, pools, sports, etc.?
- 13.10.2 What informational material, including maps, is available or needed?
- 13.10.3 Is there a local hospitality committee?
- 13.10.4 Are local offices of government available for assistance?
- 13.11 *Communications facilities*
- 13.11.1 Is special equipment needed and available? Are electronic mail or facsimile machine services available?
- 13.11.2 Who are the local telephone and telegraph contacts?
- 13.12 *Security*

- 13.12.1 Are police contacts or liaison needed?
- 13.12.2 Does the university or hotel have security guards, and how can they be contacted in an emergency?
- 13.12.3 Are political demonstrations likely in the area?
- 13.12.4 Are passes necessary to restrict attendance?
- 13.12.5 Are all buildings accessible?
- 13.12.6 Are meeting sites and areas for study tours within the prescribed areas for certain nationals? If so, can waivers be obtained?
- 13.13 *Press relations*
- 13.13.1 What are press, radio, and television services?
- 13.13.2 Who will handle publicity during the conference?
- 13.13.3 Who will respond to public inquiries?
- 13.14 *Study tours and special programs*
- 13.14.1 Are commercial charter buses available?
- 13.14.2 Are school or government buses available?
- 13.15 *Official entertainment*
- 13.15.1 What beverages can be served at the conference site?
- 13.15.2 What facilities are available for conference-wide receptions?
- 13.15.3 Are special or unique facilities available?
- 13.15.4 What are the costs of receptions, luncheons, etc.?
- 13.16 *Interpreting facilities*
- 13.16.1 Can electronic equipment be connected to the sound system?
- 13.16.2 What is the possibility for altering:
 - meeting room?
 - conference room?
 - stage and auditorium?
- 13.16.3 Where will booths for interpreters be placed?
- 13.16.4 Is there a lounge area for off-duty interpreters?

- 13.16.5 Is a sound system installed? If not, can one be installed?
- 13.16.6 Is sufficient electric power available where interpreting equipment is to be installed?
- 13.17 *Attachments to survey report*
 - 13.17.1 Floor plans of meeting rooms and office space
 - 13.17.2 Maps of campus (if conference is held at a college or university)
 - 13.17.3 Maps of city
 - 13.17.4 Brochures from hotels, services, scenic attractions, etc.
 - 13.17.5 Concessions, free supplies, etc., from airlines (official carriers), banks, and other services

14. Conference Plan and Organization

(See sections 4.5, 4.7, 11.2.3, 11.2.9, and 11.4.1)

- 14.1 Conference title:
- 14.2 Conference purpose:
- 14.3 Possible sponsors and host:
- 14.4 IUFRO contact:
- 14.5 Year, dates, and days for meetings:
- 14.6 Conference place:
- 14.7 Accommodations:
- 14.8 Conference languages (translation and/or simultaneous interpretation):
- 14.9 Anticipated attendance: technical _____ accompanying persons
- 14.10 Possible calendar of activities (registration, sessions, meals etc.)
 - Date & Day
 - Morning
 - Midday
 - Afternoon
 - Evening
- 14.11 Ancillary meeting (title, date, time, place, sponsors):
- 14.12 Meals or receptions (kind, date, time, place, sponsors):

14.13 Study tours (kind, dates, places, sponsors, responsibilities):

14.14 Special programs:

14.15 Conference Chair:

Affiliation:

Address:

14.16 Technical Program Chair:

Affiliation:

Address:

14.17 Local Arrangements Chair:

Affiliation:

Address:

14.18 Study Tour Chair:

Affiliation:

Address:

14.19 Special Programs Chair:

Affiliation:

Address:

15. Conference Budgetary Policy

(See sections 5.2, 5.4, 7.1.4, 7.1.5, 9.2.5, and 11.2.5)

15.1 A budget showing income and expenditures for all major functions should be prepared and approved in writing by the appropriate persons for each conference. The budget provides guidance for the conference committee to manage finances.

15.2 Those responsible for approving a conference budget are the conference chair and the sponsors. The sponsors and host shall have joint responsibility for deciding what functions are to be included in the conference program.

15.3 The basic budget should include at least the following items:

15.3.1 Income from all sources

15.3.2 Expenses of the conference committee

- 15.3.3 Publicity
- 15.3.4 Printing, duplicating, and mailing, including preprints, special reports, proceedings, etc.
- 15.3.5 Registration fees and costs
- 15.3.6 Technical program
- 15.3.7 Receptions, meals, hospitality, transportation, and other costs not paid separately by participants.
- 15.3.8 Subsidized attendance for students, keynote speakers, etc., if any.
- 15.4 Other functions should be listed as "extras" in the budget with separate charges for:
 - 15.4.1 Study tours
 - 15.4.2 Special programs
 - 15.4.3 Additional meals or social functions
 - 15.4.4 Publications
- 15.5 After the budget has been approved, keep costs within the budget.
 - 15.5.1 Amendments for any expenditures not covered by the budget should be approved by sponsors and host.
 - 15.5.2 The conference chair, as agent for the sponsors, is responsible for maintaining control over total costs, for adjusting categories of income and expense, and for assuring that funds are used as intended by contributors. Any part of this responsibility may be delegated to the local arrangements chair.
- 15.6 Registration fees and other expenses should be paid by nearly all participants.
 - 15.6.1 Registration fees may be adjusted upward for certain classes of participants, such as non-members, and downward for others, such as part-time participants or students.
 - 15.6.2 Complimentary registrations are to be held to a minimum.
 - 15.6.3 Complimentary registrations do not include tickets to receptions or banquets, except for invited speakers and invited representatives of the press.
 - 15.6.4 Individuals invited to receive awards or to give special addresses should be permitted free registration and other courtesies.
 - 15.6.5 Graduate or undergraduate students may be granted reduced registrations at the discretion of the conference chair.

- 15.6.6 A 1-day complimentary registration should be granted if participation is specifically invited and attendance is solely at this single program.
- 15.6.7 A complimentary full registration may be granted to a program participant who is specifically invited and who would not have been expected to attend the meeting.
- 15.6.8 The conference chair will approve all complimentary registrations and adjusted fees in advance of the conference, and will advise the recipients accordingly. The technical program chair will notify all program participants not receiving complimentary registrations of the fees they are expected to pay.
- 15.6.9 The amount of registration fees should be included in publicity and informational materials.
- 15.7 The local arrangements chair has complete responsibility for collecting and banking income and for paying expenses.
- 15.8 As soon as possible after the conference, the local arrangements chair will close the conference account and will submit a final statement of total income and expenses to the conference chair who is responsible for the final statement.

16. Conference Budget and Financial Plan

(See sections 5.4, 7.1.4, 9.2.1, 9.2.4, 10.1.1, 11.2.5, 11.4.5, 11.5.1, and 11.6.1)

16.1 *Summary*

Conference Title

Dates

Place

Host

16.1.1 Sponsors

Income
Estimated/Actual

and

Expenses
Estimated/Actual

Documents
(see section 16.2.2.1)

Publicity

Facilities
(see sections 13 and 24)

Registration and

Receptions
(see Section 23)

Registration (see section 23)	Technical program
Social events (see section 24)	Social events
Study tours (see section 26)	Study tours (see section 26)
Sales	Refunds
Other	Other
Total income	Total of expenses

16.1.2 Responsible Officials

Activity	Name and Affiliation
Financial Policy _____	
Bank account: name, location _____	
Tickets _____	
Receipts _____	
Refunds _____	

16.1.3 Budget approval

Local Arrangements Chair _____	date _____
Sponsor _____	date _____
Conference Chair _____	date _____
Sponsor(s) _____	date(s) _____

16.2 *Conference financial plan*

16.2.1 Income

16.2.1.1 Sponsors (name)	Contributions (amount, kind, limits on use)	Value (estimated/actual)
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16.2.1.2 Registration (see section 23.2)

Participants-full	(number-x fee-)	_____
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	Part-time	(number-x fee-)	_____	
	Students	(number-x fee-)	_____	
	Accompanying persons	(number-x fee-)	_____	
16.2.1.3	Social events (see section 24)			
	Banquets or meals		_____	
	Other		_____	
16.2.1.4	Study tours (see section 26)			
	Participants	(number-x fee-)	_____	
	Special programs	(number-x fee-)	_____	
16.2.1.5	Sales of documents, space, etc.		_____	
16.2.1.6	Advertising		_____	
16.2.1.7	Exhibitors		_____	
16.2.1.8	Other		_____	
16.2.1.9	Total Income		_____	
16.2.2	Expenses		Estimated	Actual
16.2.2.1	Documents (see section 27)			
	-	Preconference mailings	_____	_____
	-	Conference agendas or programs	_____	_____
	-	Preprints	_____	_____
	-	Duplicating during conference	_____	_____
	-	Proceedings	_____	_____
	-	Transcripts	_____	_____
	-	Reports	_____	_____
	-	Translations	_____	_____
	-	Copyright fees	_____	_____
	-	Information packets	_____	_____
	-	Post- conference mailing	_____	_____
16.2.2.2	Publicity			
	-	Producing and distributing news releases	_____	_____
	-	Preparing posters and advertisements	_____	_____
16.2.2.3	Facilities (see sections 13 and 24)			

-	Rooms (number cost)	_____	_____
-	Offices (number cost)	_____	_____
-	Cleaning or janitorial charges	_____	_____
-	Special security	_____	_____
-	Insurance	_____	_____
-	Simultaneous interpretation	_____	_____
-	Rental of equipment and services	_____	_____
-	Word processors and typists	_____	_____
-	Computers and printers	_____	_____
-	Photocopier and operators	_____	_____
-	Audiovisual	_____	_____
-	Sound amplifiers	_____	_____
-	Telephones, facsimile machines, electricity, etc.	_____	_____
16.2.2.4	Registration and reception (see section 23)	_____	_____
16.2.2.5	Technical program		
-	Honoraria	_____	_____
-	Travel	_____	_____
-	Mailing	_____	_____
-	Communications	_____	_____
-	Shipping costs	_____	_____
-	Translation	_____	_____
-	Interpreters and equipment	_____	_____
-	Assistants (see section 25)	_____	_____
16.2.2.6	Social events (see section 24)		
-	Meals, gratuities, taxes	_____	_____
-	Professional speakers, entertainment	_____	_____
-	Table and other decorations	_____	_____
-	Refreshments (tea, juice, etc.)	_____	_____
-	Programs, invitations, tickets	_____	_____
-	Complimentary meals	_____	_____
-	Allowance for failing to meet guaranteed minimums	_____	_____
16.2.2.7	Study tours (see section 26)	_____	_____
16.2.2.8	Programs for accompanying persons	_____	_____
16.2.2.9	Honors, awards, and gifts	_____	_____
16.2.2.10	Rental of conference space, banquet hall, cars, buses	_____	_____
16.2.2.11	Other (specify)	_____	_____
16.2.2.12	Total Expenses	_____	_____

APPENDIX B

Technical Program

17. Sample Call for Papers and Posters

(See sections 8.1.4, 11.1, 11.2.6, and 11.3.1)

(CONFERENCE TITLE)

These instructions are for the information and guidance of persons submitting papers to the conference either upon invitation of the organizing committee or voluntarily.

The theme of the conference will be:

Orientation of the meeting will be toward:

Emphasis will be placed on:

17.1 *Key addresses*

Key addresses set the scene and tone for a conference. They often provide a challenge or change for the conference. As a consequence, they usually are limited in length only by the time for presentation. Usually key addresses are given by someone in a senior position or especially distinguished capacity. The authors should be separately instructed about length, languages, etc.

17.2 *Position papers*

Position papers are invited for an authoritative statement of worldwide coverage on a subject on the conference agenda. These papers serve as a basis for discussion at the conference, after which they will (may) be revised by a committee that includes the author. These papers constitute chapters of the final report to be published as:

A position paper, including the summary, should not be longer than _____ words. It should be submitted in one of the official languages of the conference: English, French, German, or Spanish. The author's abstract should not be longer than _____ words in the same language. There should be a brief table of contents. The table of contents and the abstract should be on separate pages and should precede the main paper. Each position paper will be reproduced in full in _____ (official language).

17.3 *Special invited papers*

Invited papers should provide an authoritative detailed account of a special subject, relevant to a topic on the conference agenda. They are more restrictive in coverage than position papers.

An invited paper, including the summary, should be no longer than _____ words. It should be submitted in one of the official languages of the conference: English, French, German, or Spanish. The author's abstract should not be longer than _____ words in the same language. There should be a brief table of contents. The table of contents and the abstract should be on separate pages and should precede the main paper. Invited special papers will be printed in full in the original language only, but the abstracts will be printed in _____ (official language). Authors should provide translations of the abstract into the other official languages, if possible.

17.4 *Voluntary papers*

Voluntary papers may be contributed on subjects relevant to the conference. Including the summary, a voluntary paper should not exceed _____ words. It should be submitted in one of the official languages of the conference. A brief table of contents and the summary should be on separate pages in English, and should precede the main paper. Only citations of voluntary papers will be published, not the entire documents.

17.5 *Posters*

Posters relating to the theme and orientation of the conference will be presented at special poster sessions. To propose a poster presentation, indicate the title and author(s) and provide a brief abstract (50 to 100 words) in one of the conference languages. Authors accepted for presentation will be notified and sent instruction by (date). Posters are usually not printed. Generally, only the citation (and abstract) will be published.

17.6 Schedule (following invitations for papers) (Insert dates for action)

- **+ 2 months:** Authors respond to invitations. Posters are proposed.
- **+ 3 months** Authors provide the organizing committee with a detailed outline of their proposed papers. Authors should proceed to prepare papers without waiting for approval of outlines.
- **+ 4 months** Outlines coordinated and circulated. Authors given suggestions for improving outlines. Proposals for posters accepted or rejected.
- **+ 6 months** Special invited papers to be in hands of organizing committee.
- **+ 7 months** Special invited papers circulated to chair-persons for their information and to authors for consideration in preparing position papers. Both abstracts for accepted posters and voluntary papers to be received by organizing committee, and circulated to authors and chairpersons.
- **+ 8 months** Position papers to be in the hands of the organizing committee for circulation to chairpersons and other authors of position papers.

Address for mail and inquiries:

18. IUFRO Papers

(See sections 8.1.4 and 11.3.3)

Guidelines for the presentation and publication of papers are usually subject to rapid change. Please refer to the guidelines that are published in IUFRO News prior to each IUFRO World Congress. The following guidelines were published in IUFRO News Vol. 23, 1994, Issue 2.

18.1 *Guidelines for Authors*

18.1.1 Composition of Text

18.1.1.1 *Language:* English, French, German, or Spanish may be used. If a language other than English is used, an English abstract needs to be added.

18.1.1.2 *Structure:* The material presented should be organized under headings of three types: main, intermediate, and subheadings, and should be divided into paragraphs. In addition to Abstract, main headings will include e.g. Introduction, Methods, Results, Conclusions, and Literature Cited, or similar breakdowns.

18.1.1.3 *Title:* The title should be brief but specific enough to indicate contents.

18.1.1.4 *Abstract:* The abstract should be no more than 15 lines (80 characters per line) in length, and summarize the contents of the paper as concisely and non-technically as possible. Keywords, to a maximum of 5, should be added.

18.1.1.5 *Text:* Maximum length of complete papers is 12 pages (56 lines per page, 80 characters per line). The text should be written as outlined under "Structure". Use standard symbols for measurements and use système internationale (S.I.) units consistently. Use abbreviations of organization names sparingly if at all. They should be spelled out at the first occurrence with the abbreviation, in parentheses, immediately following.

18.1.1.6 *Tables and illustrations:* Each table should be provided with a title and referred to in the text. All illustrations should be numbered consecutively and referred to in the text.

18.1.1.7 *Literature cited:* All literature consulted during the preparation of the paper should be acknowledged in the literature cited, alphabetically by author, and, within publications by the same author, according to the year of publication.

Sequence: name of author, initials, year of publication, title, periodical or publisher, number of pages. The titles of periodicals should be in italics, and should not be abbreviated. In the text reference, the date should follow the author's last name without a comma.

Sample citation list entries:

Aubréville, A., 1949: Climats, forêts et désertification de l'Afrique tropicale. Société d'éditions géographiques, maritimes et coloniales, Paris, 351 pp.

DeBano, L.P. and Rice, R.R., 1973: Water-repellent soils; their implication in forestry. *Journal of Forestry*, vol. 71, no. 4, pp. 220-223.

Kern, H. und Naef-Roth, S., 1965: Zur Bildung phytotoxischer Farbstoffe durch Furarien der Gruppe Martiella. *Phyto-pathologische Zeitschrift*, vol. 53, pp. 45-64.

Sample of text references:

(Tremblay 1985); (Smith et al. 1979); ... Peace (1962) believed

18.1.1.8 *Date and address:* Date of preparation and address of the author should be noted at the end of the paper.

18.1.1.9 *Credit:* Authors who present papers at a meeting and subsequently publish elsewhere are asked to include the statement 'This paper was presented at the "... meeting.'

18.1.2 Layout and Delivery of Papers

18.1.2.1 *Delivery of papers:* Papers should be submitted both as hard copies and as electronic data files. The latter will allow a quick publication of the Proceedings after the conference.

18.1.2.2 *Data formats:* If possible, use commonly used file formats and word processing programs. Use standard PCs as platforms, because this helps to avoid difficulties with the data conversion (special characters). The organizer of a conference will normally specify the desirable or acceptable word processor.

18.1.2.3 *Layout:* The Conference Proceedings are usually published in a publication series of the member organization that hosts the conference. Most member organizations of IUFRO have defined their own guidelines for publications, which can be applied to the Proceedings either directly or in a modified way.

The conference organizer will distribute the guidelines for the layout of the papers together with the invitations. These guidelines should be strictly adhered to in order to save time in the publication of the Proceedings. If no such guidelines are provided, please apply the "Recommendations for the Layout of IUFRO Papers".

18.1.2.4 *Typewriter:* Those authors who do not have access to a computer should make sure the type face is of good quality.

As a rule, the meeting organizer will send out the guidelines for the layout of papers together with the invitation.

If this is not the case, the following guidelines should be observed. They are not meant to determine the definite layout but shall rather help the meeting organizer to transfer the texts of papers easily into other text or layout programs for editing the Proceedings.

18.2 *Recommendations for the Layout of IUFRO Papers*

18.2.1 Printouts and data files

18.2.1.1 *Data files:* The text that is presented for publication shall be handed in both as a printout and as an electronic data file. In order to avoid any problems with the layout, the printout should be of good quality.

18.2.1.2 *Typewriter:* Those authors who do not have computers should try to copy the structure of this sample page. A high-quality printout is indispensable for scanning the paper. However, as not every meeting organizer has a scanner, the papers should possibly be handed in as data files.

18.2.2 Computers and word processing programs

18.2.2.1 *Computers:* Use a standard PC if possible. This will help to avoid problems with converting special characters.

18.2.2.2 *Word processing programs:* Use a common word processing program if possible.

18.2.2.3 *Diskette label:* On the diskette label you should indicate your name, the file name(s), the type of computer and the word processing program you have used.

18.2.3 Format and characters

18.2.3.1 *Margin:* Set the left margin at 0, the right margin at 14 cm. The metric system should be used throughout.

18.2.3.2 *Text alignment:* Please write single-spaced with a left flush margin.

18.2.3.3 *Base font:* Use Courier 10 point as base font. This font is common to every computer and will facilitate the calculation of the text size.

18.2.3.4 *Title and headings:* In accordance with the structure of your paper, please apply the following type sizes for title and headings:

Subheadings: 10 Point bold

Intermediate headings: 12 Point bold

Main headings: 14 Point bold

Title: 18 Point bold

18.2.4 Writing

18.2.4.1 *Indentation and tables:* Never use blanks for indentations or tables! Only tabs will ensure flush margins and allow to change distances with only one command.

18.2.4.2 *Syllabication:* Avoid syllabication by all means! If texts are to be transferred into another format, the hyphens will be shifted to other positions and would have to be deleted by hand.

18.2.4.3 *Paragraphs:* Separate paragraphs with one space and sub-chapters with two spaces. The person in charge of the layout will thus be able to carry out necessary changes with one command only.

- 18.2.4.4 *Numbering of chapters:* Number the chapters according to the decimal system. If you write on a typewriter, the person in charge of the layout will be able to assign the right type sizes more easily.
- 18.2.4.5 *Setting off texts:* Avoid excessive setting off of texts as this will disturb the reading flux. Use bold letters for setting off and italics where they correspond to the international standard (e.g. for species). Please do not underline text!
- 18.2.4.6 *Capital letters and small letters:* Please use both capital letters and small letters in your headings. Capital letters only make reading rather troublesome. The texts will be set off by the different sizes and kinds of type.
- 18.2.5 *Figures and illustrations:* Illustrations and figures shall be submitted either as camera-ready hard copies or as data files.
- 18.2.5.1 *Hard copies:* The hard copies should be clearly identified with the number of the figure, the author's name and the title of the paper. Please indicate exactly which section of figure you would like to have reproduced. Please mark visibly the position of the illustration by indicating its number in the text.
- 18.2.5.2 *Data files:* In order to avoid problems, only use TIF or EPS files. Each figure is to be stored as an individual file. Please mark visibly the position of the illustration by indicating the name of the corresponding file in the text.

19. Audiovisual Presentations

(See sections 8.1.4 and 11.3.3)

- 19.1 *Program chair or moderator:*
- 19.1.1 When inviting presenters, be sure they understand what is expected, the time schedule to be followed, size and interests of audience, and physical facilities available.
- 19.1.2 Check meeting room in advance to learn how to control lighting, air conditioning, and window covering.
- 19.1.3 Learn equipment needs. Plan to supply: 35 mm slide projectors with extra bulbs and trays; overhead projectors; cassette playback units for synchronized slide-tape programs; dissolve units for multi-image projection; electric cord extensions; flip-charts; and video display facilities.
- 19.1.4 Obtain a floor plan of the meeting room. The size of both the room and the audience will govern legibility of slides. Location of electrical outlets may be critical.
- 19.1.5 In typical viewing situations, the maximum screen to view distance should be about eight times the height of the projected image. In a room 9.6 m long (32 feet), a projected image of lettering or other detail should be 254 mm (1 inch).
- 19.1.6 There should be trained assistants available to operate equipment and solve problems (see section 25).

- 19.1.7 Invite presenters to inspect the facilities in advance.
- 19.1.8 If questions are accepted, repeat them into a microphone before the question is answered.
- 19.1.9 Inform presenters courteously but firmly when allotted time expires.
- 19.1.10 Maintain schedule to allow for discussion.
- 19.2 *Presenters:*
 - 19.2.1 Producing tables
 - 19.2.1.1 Omit the table number.
 - 19.2.1.2 Omit the title or reduce it to a few key words.
 - 19.2.1.3 Simplify column headings.
 - 19.2.1.4 Limit the number of columns to three or four.
 - 19.2.1.5 Omit lines or columns of data not to be discussed.
 - 19.2.1.6 Use attached models as guides for copy size (see section 19.3).
 - 19.2.2 Producing graphs
 - 19.2.2.1 Use simple symbols and legends.
 - 19.2.2.2 Show only points essential to the presentation.
 - 19.2.2.3 Use only a few lines.
 - 19.2.2.4 For black and white slides, drop out grid pattern if possible.
 - 19.2.2.5 For color slides, use a few colored grids with bold curves and heavy lettering.
 - 19.2.3 Presenting the talk
 - 19.2.3.1 Limit each visual to one main idea.
 - 19.2.3.2 Use series of visuals for progressive disclosures (in which each visual is exposed in succession).
 - 19.2.3.3 Use slides to supplement, not to repeat, what is said.
 - 19.2.3.4 Use several simple visuals rather than one complicated visual.
 - 19.2.3.5 Use duplicates if referring to the same visual several times.

- 19.2.3.6 Change visuals regularly. A good target is 30 seconds per visual: no more than 80 words of talk per visual.
- 19.2.3.7 Do not leave a visual on the screen after discussing the subject.
- 19.2.3.8 When lengthy discussion interrupts visuals, project a soft colored blank visual.
- 19.2.3.9 Always place the emulsion, or dull, side of a slide toward the screen.
- 19.2.3.10 Preview your slides to become familiar with their order and to eliminate some.
- 19.2.3.11 As you travel, carry your visuals and your paper with you—not in your luggage.

19.3 *Models for typed slides:*

Typing for photographic production on 35 mm for slides should be large enough to be legible. Sizes of typed characters are shown in model frames of correct size. Put the model frames behind the paper in typewriter as guides. Do not type in margins.

Encourage the use of modern computer graphics because they provide much better results.

20. Poster Presentations

(See sections 8.1.4 and 11.3.3)

20.1 *Instruction for organizers*

At poster presentations, one or more large meeting rooms are filled with display boards. Presenters mount a summary or abstract, and charts, photographs and data to illustrate their presentation. Participants may view and study the posters at their leisure. Time is scheduled for each presentation. Organizers of poster sessions should consider the following:

- 20.1.1 Send announcements for poster presentations at the same time as invitations for formal papers (see section 17).
- 20.1.2 Request an abstract of no more than 500 words at least 2 months before the conference.
- 20.1.3 Determine the size of rooms for posters and whether they can be mounted directly on walls. If possible, get floor plans of rooms.
- 20.1.4 According to the configuration of the room(s) and wall space available, determine whether wall-mounted, table-top, or free-standing posters allow easier traffic flow. Allow a minimum of 2 m (6 feet) for aisles between displays.
- 20.1.5 Limit acceptances for poster presentations to the number that can be accommodated in the rooms.

- 20.1.6 Allow a minimum of 1 to 1-1/2 hours for each group of poster presentations when the author or authors must be present. Leave posters up for some time before and after presentations for study by participants.
- 20.1.7 If possible, divide posters into two or three groups and schedule groups for presentations at different times. This allows more time between poster discussions and minimizes distraction from competing voices and crowding.
- 20.1.8 If concurrent formal presentations are underway, poster sessions should be keyed to similar subject matter.
- 20.1.9 Inform poster presenters about the arrangement of room and boards, size of boards, schedules, and languages. Instruct them to bring poster and mounting materials to the meeting, to set up their materials on the display board at a scheduled time, and to remove materials at a scheduled time.
- 20.1.10 Do not mingle slide or video displays with poster displays.
- 20.1.11 Staff assistants should help mount and dismount posters.
- 20.1.12 Have on hand: mounting tape, pins, velcro, marking pens, and paper on easels for use during discussions.
- 20.1.13 Notify authors in advance whether poster presentations will be published in abstract or other form.

20.2 *Instructions for presenters:*

Poster sessions offer advantages over more formal oral or slide presentations before a large audience. Presenters at poster sessions place an abstract or summary, plus graphs, photographs, charts, and other data on a posterboard in a display area. Interested participants study them at their leisure. During a specified period in the program, the presenter stands by the poster to discuss the topic. Posters often lead to informal presentations. Poster sessions attract participants with interests similar to those of the presenter; thus, the dialogue is frequently mutually beneficial.

- 20.2.1 Preparing posters
 - 20.2.1.1 Posterboards usually are one of the following sizes: 1.2 by 2.4 m (4 x 8 feet) erected either vertically or horizontally; or 1.2 m square on tables. If boards are 1.2 by 2.4 m erected vertically, DO NOT use the lower 0.75 m (30 inches) because it is hard to read.
 - 20.2.1.2 Mount elements of your poster on lightweight artboard that can be easily fastened with pins, tacks, or tape.
 - 20.2.1.3 Posters should have the title, author(s), abstract, accompanying tables, graphs, photographs, and a summary of conclusions or results presented in a logical order.

- 20.2.1.4 All lettering on posters must be legible from a minimum of 2 m (6 feet). Lettering for the title should be at least 2.5 to 3 cm; headings should be at least 2 cm; and text should be at least 8 to 12 mm. Some typical arrangements of materials and letter sizes are shown on the following pages.
- 20.2.1.5 When announcing your wish to present a poster, indicate the size and style of display board you prefer. This will help the organizer to decide the arrangement of the room and posters.
- 20.2.1.6 Arrange your poster at home. Do not crowd your material.
- 20.2.1.7 Present your poster to colleagues or friends. Ask them how it can be arranged or presented more effectively.
- 20.2.2 Presenting posters
 - 20.2.2.1 Bring all materials needed for your poster and mount it at the scheduled time.
 - 20.2.2.2 Present your poster from _____ to _____ (am, pm, hours). Be prepared to answer questions and to give further information.
 - 20.2.2.3 Titles (and abstracts or brief summaries) (will) (will not) be printed in the program and in the proceedings.
 - 20.2.2.4 Projectors will not be available and cannot be used in the poster area. However, there may be video presentations if the author supplies the equipment.
 - 20.2.2.5 Remove your poster at _____ (am, pm, hours) so the space will be available for others. Posters not removed as scheduled will be removed and discarded by monitors.

21. Chairperson and Technical Rapporteurs

(See sections 8.1.7, 8.1.8, and 11.5.3)

Session title:

Purpose or objectives of session:

Date: _____ Time to start _____ Break: _____ Finish:

Place:

Names

Affiliations

Chair:

Co-chairs:

Technical Rapporteur(s):

Room monitors:

- Assistant to chair
- Equipment
- Doors
- Messengers
- Presenters (in order of introduction)

Special Instructions:

22. Presenters

(See sections 8.1.8, 11.5.3, and 11.5.7)

Presenter (Prof., Dr., Mr., Mrs., Ms., Other)

Affiliation:

Contribution title:

Session for presentation:

Date _____ Session _____ Start _____ Finish _____

Place

Your presentation is estimated to start at _____ ;

duration of

Presentation _____ minutes _____

Questions _____ minutes _____

Total _____ minutes _____

Chairperson:

Affiliation:

You are requested to attend a preview session for those managing and presenting at this session on:

Date _____ Session _____ Start _____ Finish _____

Place

For purposes of introducing your presentation, please send a brief biography including: education, work assignments, honors, reasons for interest in presentation, etc.,

to _____ by _____ . (date)

APPENDIX C

Local Arrangements

23. Registration and Reception

(See sections 9.3, 9.4, 11.1, 11.5.8, and 11.5.11)

23.1 *Activity or material needed:*

	Check (if needed)	Cost Estimated/Actual
Registration desk	_____	_____
Information desk	_____	_____
Message and notice boards	_____	_____
Greeters	_____	_____
Directional signs	_____	_____
Large signs, for meeting people at the airport	_____	_____
Support staff	_____	_____
Name tags	_____	_____
Name plates	_____	_____
Duplication/photocopiers	_____	_____
Large font typewriters	_____	_____
Word processors	_____	_____
Typing	_____	_____
FAX machines	_____	_____
Registration forms	_____	_____
Data base for registrants	_____	_____
Telephones	_____	_____
Cash box and change	_____	_____
Receipts	_____	_____

Mementos for:

- Participants _____

- Staff _____

Transportation:

- Autos _____

- Buses _____

Communications _____

Translation _____

Interpretation _____

Other (Specify) _____

23.2 *Registration process* (see section 16.2.1.2):

Income is calculated from the estimated number of participants and compared to the actual number of:

	Number x fee	Estimated	Actual
		Income	Income
Preregistrants	_____	_____	_____
Full registrants	_____	_____	_____
Partial registrants	_____	_____	_____
Complimentary registration	_____	_____	_____
Students	_____	_____	_____
Accompanying persons	_____	_____	_____

23.3 *Registration information* (to be collected):

	Yes	No
Name	_____	_____
Address	_____	_____
Affiliation	_____	_____

Where residing during conference _____

Profession _____

Position _____

Level of experience _____

Interests _____

Expectations from conference _____

Other (specify):

23.4 *List of participants* (See section 27.1)

Preliminary (to be available for first day of conference) _____

Interim registrants (to be available for corrections on next to last day of conference) _____

Registrants (final listing for proceedings or reports) _____

24. Conference Facilities

(See sections 9.4, 9.7, 11.1, 11.4.4, and 11.5.8)

24.1 *Space for meetings*

Plenary session: Date & time; Participants; Space assigned; Cost; Equipment

Split sessions: _____; _____; _____; _____; _____

Work groups: _____; _____; _____; _____; _____

24.2 *Space for special programs and functions*

Coffee breaks: Date & time; Participants; Space assigned; Cost; Equipment

Luncheons : _____; _____; _____; _____; _____

Hospitality : _____; _____; _____; _____; _____

Banquets/

dinners : _____ ; _____ ; _____ ; _____ ; _____

Other (specify)

Total: _____

24.3 *Space for other than meetings*

Press Room _____

Poster display _____

Hospitality Room _____

Reception area _____

Other (specify) _____

24.4 *Equipment or services (summarized from above)*

<i>Equipment or services.</i>	<i>Kind/Number</i>	<i>Sources</i>	<i>Cost</i>
Projectors; slide, overhead, video	_____	_____	_____
Screens	_____	_____	_____
Projection operators	_____	_____	_____
Interpretation	_____	_____	_____
Sound equipment	_____	_____	_____
Sound equipment operator	_____	_____	_____
Posterboards	_____	_____	_____
Chalkboards	_____	_____	_____
Flannel or velcro boards	_____	_____	_____
Magnetic boards	_____	_____	_____
Pads of newsprint, stands	_____	_____	_____
Pencils and paper	_____	_____	_____
Telephone, FAX machines	_____	_____	_____
Tape recording	_____	_____	_____
Transcribing	_____	_____	_____

Duplication/photocopier _____

Session question cards _____

Other (specify) _____

24.5 *Persons responsible for facilities, equipment, and services*

Name	Title	Address	Telephone	Responsibilities
------	-------	---------	-----------	------------------

_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

25. Session Assistants

(See sections 9.4.2 and 11.5.9)

Assistants should be available to help the chair and presenters during conference sessions. The number and kinds of helpers depends upon the conference design. Usually they monitor entrance doors, operate equipment and lighting, and serve as messengers.

25.1 *Door monitors*

25.1.1 Arrive 15 minutes before start of session.

25.1.2 Help flow of participants in and out of meeting room.

25.1.3 Give materials to entering participants.

25.1.4 Encourage those standing at rear or in doorways to take available seats.

25.1.5 Maintain an announcement board outside the room listing names and subjects of current and future presenters.

25.1.6 Keep doors closed to minimize outside distractions.

25.2 *Equipment operators*

25.2.1 Install all equipment well before the beginning of the session.

25.2.2 Be able to make necessary repairs or adjustments to equipment if problems occur.

25.2.3 Control lighting directly or via an intermediary.

25.2.4 Receive all materials from presenters before session and return materials promptly after session.

25.2.5 Have supplies such as chalk and erasers, transparencies and pens for overhead projection, pointers, extra carousels or cartridges for the slide projector, etc., readily available.

- 25.3 *Messengers*
- 25.3.1 Take places at side and rear of room.
- 25.3.2 Know locations of all conference services.
- 25.3.3 Have materials for preparation of messages, questions, etc.
- 25.3.4 Manage microphones for those speaking from audience.

26. Study Tours and Special Programs

(See sections 9.7, 11.3.4, and 11.5.8)

26.1 *Summary of each tour or program*

Title: _____

Objectives: _____

Outline of schedule and itinerary: _____

Number of people to be accommodated: _____

Anticipated environmental conditions: _____

Suggested clothing: _____

Fees: _____

Individuals responsible

Briefing papers and maps: _____

Guides: _____

Hosts: _____

Sponsors: _____

Press relations: _____

-
- 26.2 *Site Visits*
- 26.2.1 Have representatives mark route, stops, and scenic points before visits.
 - 26.2.2 Know areas for loading, unloading, turning, and parking.
 - 26.2.3 Keep a list of those on the field trip, and use it to be sure no one is left behind.
 - 26.2.4 Have supplementary information for distribution.
 - 26.2.5 Relate documentation to stops and order of presentations, including both data shown in visuals and answers to anticipated questions.
 - 26.2.6 Explain purposes of visit, route, things to observe, and times allotted; introduce local hosts or sponsors.
 - 26.2.7 Warn about areas or equipment not to be photographed.
 - 26.2.8 Arrange logical order of presentations to follow flow of decisions, activities, or process.
 - 26.2.9 Designate a vigorous leader to move the group along, and a tactful person to keep stragglers moving, i.e., a puller and a pusher.
 - 26.2.10 Keep presentations brief, expecting discussion to draw out untold facts.
 - 26.2.11 Plant questions or prompters to elicit controversy and to present alternative viewpoints.
 - 26.2.12 Plan that discussion will be at least as long as presentations.
 - 26.2.13 Watch for side discussions and other distractions or lack of interest. When seen, quickly recapture attention, summarize, or move to next topic.
 - 26.2.14 Wait to start presentations until most people are close to presenter; carry a bullhorn (voice amplifier) for presenters with soft voices.
 - 26.2.15 Have prior agreements with operators or contractors to stop machinery or other distractions while the presenter is talking.
 - 26.2.16 Split large groups into smaller, more manageable groups (up to 25) to stimulate discussion and to speed movement.
 - 26.2.17 Visual aids should be visible from 5 meters (16 feet), simple and uncluttered, in different colors, moisture proof, wind firm, supported by others than presenter.
 - 26.2.18 Show or demonstrate clothing and equipment, techniques, machines, or systems.

- 26.2.19 Remember safety—i.e., provide protective headgear, glasses, ear protectors, or clothing; mark any hazards or make them inaccessible.
- 26.2.20 Give some guests "hands on" experience, if possible.
- 26.2.21 Arrange for suitable group photographs.
- 26.2.22 Provide samples or specimens and be prepared to mail to participants' homes.
- 26.2.23 Describe visits in exact terms, such as study tour, inspection, or review, rather than as an excursion or a field trip.
- 26.2.24 Be sure that the tour leader or spokesperson knows the host's name and address, and makes a point of thanking the host verbally, and in public.
- 26.2.25 Give names, affiliations, and addresses of participants to hosts and sponsors.
- 26.2.26 Provide balanced amount of literature from commercial enterprises involved to avoid monopolistic advertising.
- 26.2.27 Distribute signs or lists of technical terms, scientific names, and other words that might not be understood verbally.
- 26.2.28 Whether stopping for meals, for lodging at the end of the day, or for any other reason, inform the group on when they are expected to reconvene, and where.
- 26.2.29 Designate someone to receive and handle complaints and problems.
- 26.3 *Vehicular transportation*
- 26.3.1 Schedules
- 26.3.1.1 Arrange for vehicles to arrive at least 30 minutes before scheduled departures.
- 26.3.1.2 Announce exact departure time and earlier times for baggage and travellers to load.
- 26.3.1.3 At each stop, allow 10 minutes for disembarking and another 10 minutes for embarking; the minimum time for any one stop should be 20 to 30 minutes.
- 26.3.1.4 Plan ahead for camera stops at vistas and points of interest.
- 26.3.1.5 Try not to exceed 2 hours of continuous driving.
- 26.3.1.6 Provide comfort stops every 2 to 3 hours, certainly at mid-morning (10:00 - 11:00) and midafternoon (2:00 - 3:00).
- 26.3.1.7 Schedule arrival at lodging preferably by 5:00 p.m., but no later than 6:00 p.m.
- 26.3.1.8 Schedule morning departure no sooner than 1.5 hours after earliest serving of breakfast.

- 26.3.1.9 Provide time at suitable places for money exchange, shopping, souvenirs, gifts, pharmaceuticals, and postal services.
- 26.3.1.10 Check reliability of transportation equipment and operators.
- 26.3.1.11 Check that buses and other vehicles are able to move on forest roads under consideration (vehicle mass, ground clearance, sharp curves, bearability of roads and bridges, turning points, etc.). If possible, carry a portable phone in the bus.
- 26.3.2 Routes
 - 26.3.2.1 Know length, width, height, weight, and turning radius of vehicle for clearances. Check route.
 - 26.3.2.2 Discuss route, schedule, off-road travel obstacles, luggage, parking, etc., with driver or dispatcher. Make a fully loaded dry run, and a last minute check for changes.
 - 26.3.2.3 Give participants maps marked with routes and stops.
 - 26.3.2.4 Consider safety in getting on and off vehicles.
 - 26.3.2.5 Provide supplementary transport for handicapped or less capable individuals.
- 26.3.3 Reserve spaces at front of vehicles for guides.
- 26.3.4 Provide supplementary transport to precede or follow the main group, to transport excess baggage, food, participants who become ill, etc.
- 26.3.5 Provide sufficient capacity to transport not only participants, but also guides, hosts, sponsors, etc.
- 26.3.6 Prepare to provide separate receipts for, or itemization of transportation costs, if included in a package cost.
- 26.3.7 Arrange for unneeded luggage to be left behind and retrieved after travel.
- 26.3.8 Arrange contact points should anyone become lost.
- 26.4 *Lodging*
 - 26.4.1 Preregister travellers and preassign rooms, if possible; have a representative precede group to accommodations to avoid crowding and waiting at registration, haggling over rooms, etc.
 - 26.4.2 Deliver room keys on bus before disembarking, if possible.
 - 26.4.3 If doubling up in rooms is necessary, notify participants early, allow them to choose roommates, keep nationals together, and adjust costs for those inconvenienced.

- 26.4.4 Try to provide economical spaces for students, those travelling at personal expense, etc.
- 26.4.5 Tell participants what they must bring; e.g., linen, sleeping bags, self- service, etc.
- 26.4.6 Arrange early payment to hotels by checkout the night before departure, by including hotel fees in tour cost, by early opening of cashier, etc.
- 26.4.7 Check before departure that room keys have been returned.
- 26.4.8 Give participants an itinerary, name, address, telephone, FAX, and telex numbers of accommodations before they leave home.
- 26.4.9 Describe any activity requiring special equipment, such as saunas, swimming, tennis, skiing, etc.
- 26.4.10 Be able to provide separate receipts for lodging if included in package cost.
- 26.5 *Meals*
- 26.5.1 Announce times in advance for eating and for starting next activity.
- 26.5.2 Announce methods of payment and protocol for tipping, etc.
- 26.5.3 Explain menu content, specialities, alternatives, inclusives, etc., for those unfamiliar with local languages and customs.
- 26.5.4 Seat host(s) at each table and encourage local participants to spread themselves among visitors, or vice versa.
- 26.5.5 Consider individual variations in eating and drinking habits; i.e., do not make all lunches identical, accommodate vegetarians, etc.
- 26.5.6 Avoid causing non-drinkers or light eaters to pay for heavy consumers.
- 26.5.7 Coordinate what hosts intend to serve participants to avoid duplication, over-feeding, not enough time between meals, special dietary considerations, etc.
- 26.5.8 Order fixed menus and box lunches well in advance.
- 26.5.9 Provide snacks of fruits, candies, etc., during long trips.
- 26.5.10 Provide adequate, sanitary beverages.
- 26.6 *Hospitality and reception*
- 26.6.1 Announce opportunities or need for hospitality to potential hosts long before itinerary and schedule are decided.
- 26.6.2 Confirm dates, times, places, and intentions of hosts by word or writing.

- 26.6.3 Give participants advance notice for arranging schedules, clothing, gifts, etc.
- 26.6.4 Arrange mailing of invitations and tallying of responses, if necessary.
- 26.6.5 Arrange to welcome participants, introduce them, and provide appropriate expressions of gratitude.
- 26.6.6 Assure that participants arrive as scheduled and do not overstay their invitation.
- 26.6.7 Arrange exposure to and explanation of local customs, food, drink, history, treasures, clothing, music, and other cultural features.
- 26.6.8 Prepare to offset objectionable behavior, such as drunkenness, political harassment, etc.
- 26.6.9 If appropriate, arrange for political, government, professional, or technical leaders to welcome participants and to answer relevant questions, with local news media present.
- 26.6.10 Give hosts and participants a list of names, addresses, and affiliations of participants.

27. Printing and mailing

(See sections 10.2, 11.1, 11.2.7, 11.3.2, 11.3.6, 11.4.6, 11.5.2, and 11.5.11)

27.1 *For distribution before the conference*

	Date Print/Deliver	Number	Cost Print/Deliver
Announcement (see section 11.2.7)	_____	_____	_____
Detailed proposal and enrollment form (see section 11.3.6)	_____	_____	_____
Invitation to participate (see sections 11.2.6 and 11.4.2)	_____	_____	_____
Information for presenters (see sections 11.3.3, 11.5.3, 17-20, and 22)	_____	_____	_____
Information for chairperson (see sections 11.5.3, 17, and 21)	_____	_____	_____
Requests for biographical information (see sections 11.5.2 and 22)	_____	_____	_____

Details on participation (see section 11.4.7)	_____	_____	_____
Tentative program (see section 11.4.1)	_____	_____	_____
Preprints (see section 11.3.2)	_____	_____	_____

27.2 *For distribution during the conference*

	Number	Cost
Final programs or agendas (see section 11.5.2)	_____	_____
Local information	_____	_____
Facility floor plan	_____	_____
Maps	_____	_____
Addresses and telephones of Embassies or consulates	_____	_____
Entertainment and meal guides	_____	_____
Health services information	_____	_____
Money exchange information	_____	_____
Registration forms	_____	_____
Tickets	_____	_____
Complimentary portfolio	_____	_____
Information for study tours and special programs (see section 26)	_____	_____
List of participants (see section 23.4)	_____	_____
Preliminary (see section 11.5.10)	_____	_____
Interim	_____	_____
Final (see section 10.1.2)	_____	_____
Reports and recommendations (specify)	_____	_____
Other (specify)		

27.3 *For distribution after the conference*

	Date Print/Deliver	Number	Cost Print/Deliver
Proceedings	_____	_____	_____
Transcripts	_____	_____	_____
Reports	_____	_____	_____
Other (specify)			
