

Operations Panel:
***Strategies for Planning Fantastic
IAB Meetings***

Joanne Aller
Administrative Assistant
Center for Dielectric Studies

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Introducing:

- Joanne Aller, Administrative Assistant, Center for Dielectric Studies
- Materials Research Institute, The Pennsylvania State University, University Park, Pennsylvania
- Number of years in this role: 21 ½
- I/UCRC operations responsibilities nearly full-time (approx. 80%). Remaining time is spent providing administrative support to the CDS Director and faculty on non-CDS projects and teaching.



About Our I/UCRC:



- Center for Dielectric Studies (CDS)
- Established 1984; became multi-university Center in 2001 with University of Missouri-Rolla (UMR), now Missouri University of Science & Technology (MST).
- Lead site: Penn State University
- Other sites: Missouri University of Science & Technology
- CDS conducts research in materials for electroceramics; members range from ceramic powder manufacturers to component and device manufacturers.



Our Top Strategies for Planning IAB Meetings:

- Organization
- Communication
- Responsiveness to Members
- Adaptability
- Follow-up



Strategy 1: Organization

- Pre-organization: Lay the groundwork for a successful meeting at the beginning!
 - Meet w/director(s), discuss expectations, ideal dates/location, etc.
 - Location: choose best financial and logistical fit
 - Income/expense spreadsheet (2 worksheets)
 - Estimate: meal/AV costs, attendees, etc. – set registration fee that will balance
 - Actual: to track income vs. expense
- Timetable
 - Major tasks and targets dates
 - Get them on your calendar—with Reminders!
- Checklist
 - All tasks, pre-org. to post-meeting—as detailed (or not) as you want
 - Group by time periods (6-mo. prior, 3-4 mo. prior, etc.)
 - Target date for each, space to check off when completed
 - Refine list after each meeting



Strategy 2: Communication

- Speakers/poster presenters: as soon as agenda is drafted
 - Confirm presentation titles
 - Communicate what you need from them & deadlines
- Director(s)/Evaluator: update each other frequently
- Hotel: exchange updates (guest room reservations/meeting registration)—follow up
- Be a Pest—it's your job! 😊
 - Schedule deadline reminders
 - Harass the offenders
 - Whatever it takes to have it together on Meeting Day 1!



Strategy 3: Responsiveness to Members

- Members make the Center—listen to them!
- Promotes member satisfaction
 - Respond to special requests promptly
 - Find ways for absent members to participate
 - Webex and/or video recording
 - Meeting materials available on secure website
 - IAB Caucus: note members' requests/comments
 - Mark Action Items in IAB minutes
 - Group in one list at end of minutes
 - Review when planning next meeting—be sure all concerns have been addressed!



Strategy 4: Adaptability

- All will not fall into place according to plan—accept it!
 - Stretch deadlines where you can
 - Adjust details as needed—even at last minute ☹️
 - Adapt hotel arrangements to registration numbers and other changing factors
 - Remember—again—that members make the Center; hear their concerns and adjust!



Strategy 5: Follow-up

- Send IAB minutes/meeting report/other deliverables to members promptly
- Update checklist/note Action Items for next meeting
- Update mailing lists from meeting registration list
- Pay bills/close out meeting
- Start planning the next one!



To Summarize...

- Organization
 - Most basic, most important strategy
- Communication
 - Throughout entire process—keeps things on track, minimizes unpleasant, last-minute surprises!
- Responsiveness to Members
 - Member satisfaction = Center success
- Adaptability
 - Timetable/checklist invaluable—but don't get too married to it—adapt!
- Follow-up
 - Tie up details, get your Action Items in order for the next meeting!



A few additional comments...

- Try your best not to have a:



– Hurricane



– Fire Emergency

—if you do, remember Strategy No. 4—Adapt!

