Operations Panel:

Strategies for Planning Fantastic IAB Meetings

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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!