# Volunteer vs. Professional Management of Academic Conferences: A Comparison of Five Meetings[i]

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**ABSTRACT**

Academic conferences operate under a range of models from nearly all volunteer to a mix of volunteer and professional event management. This paper will compare the event management practices of five conferences:

- The Organizational Behavior Teaching Conference (OBTC),
- The Western Academy of Management (WAM),
- The North American Case Research Association (NACRA),
- The Academy of Management (AOM), and
- The Institute of Behavioral and Applied Management (IBAM)

In each case, the analysis will examine the mix of volunteer and professional management used to organize and operate the parts of the annual meeting each organization holds that are separate from the program such as reserving the hotel, ordering meals, and offering special group events. Along a continuum, OBTC uses the least professional event management and IBAM uses the most. The other organizations fall somewhere in between. Professional event managers who organize conferences on a repeated basis have a distinct advantage over volunteers who change jobs every year, thereby losing large amounts of experiential learning. The all-volunteer organizations justify their choice of amateur event managers on the basis of lower up-front cost and "preserving our culture," but neglect to account for the wide variations in performance, lack of accountability, and burnout that can come with use of volunteers.

**Keywords:** Academic Conferences, Knowledge Management, Volunteer Staffing, Event Management

## WHY STUDY THE MANAGEMENT OF ACADEMIC CONFERENCES?

The author has been involved in managing four academic meetings first hand: OBTC 2004, WAM 2003, WAM 2005, and WAM 2006 and served on the board of two other organizations that run annual conferences: NACRA and the Management Education and Development (MED) Division of the Academy of Management. I attended the 2005 IBAM Conference in Scottsdale, AZ and conducted follow-up interviews with the travel agents who have provided local arrangements for the conference the last several years. In addition, I conducted a strategic audit [2] of the Western Academy of Management in the fall of 2005. In the course of conducting that audit, I was unable to find any existing literature on the operation of academic conferences. The closest resource available was a twenty-year-old book on running trade shows [1] that was very detailed but was directed at event managers and not based on any systematic research. The theme of this year's International Symposium on Knowledge Communication and Conferences is very fortuitous in beginning a dialogue on the topic.

In hopes of encouraging that dialogue, this paper will first discuss five different examples of organizing, ranging from highly dependent on volunteers for the entire operation, to a mix of volunteer and professional staffing that could lead to greater effectiveness if the volunteer energy is redirected from operations to strategic thinking and customer relationship marketing for the society sponsoring the conference. In each case, I will address four key themes:

1) The issue of mixing of volunteer and professional staffing for the event

2) The issue of who hosts the conference, a university versus a local arrangements committee from several institutions

3) The issue of corporate memory, how does the organization hold on to lessons learned each year without impeding efforts to change?

4) The issue of how the size of the conference relates to the methods selected to manage it.

## THE ORGANIZATIONAL BEHAVIOR TEACHING CONFERENCE (OBTC)

I first attended OBTC in 1991 when I was a graduate student. The conference was held at Western Washington University in Bellingham, Washington. Western Washington had a separate dormitory complex that was well suited to the meeting. We ate our meals in the dining hall and met in classrooms and in the dormitory lobbies. For larger events, we used one of their large lecture halls. I did not become a regular attendee after that conference, but I did have a good time and gained valuable insights into the teaching process.

I later attended OBTC's at Las Cruces, New Mexico; LaVerne, California; and Orange, California; hosted by University of New Mexico, University of LaVerne, and

Chapman University, respectively. At Chapman, colleagues from my home university and I were implored by various members of the society's board to be the hosts for the 2004 conference. This was in June of 2002. The 2003 conference was already set for Western New England College in Springfield, MA, but they still had no host for the following year. We talked it over with our dean, who happened to be attending and with her support, decided to make a proposal. Agreeing to host meant sending a representative to Springfield for the OBTS board meeting in November, attending the 2003 conference and board meeting, and serving as combined local arrangements coordinator and program chair for the 2004 meeting. Because OBTC's are held at the host campus instead of at local hotels, the coordinator must put together the contracts for catering and dorm rooms with the campus. In addition, the coordinator must reserve classroom and meeting space, find donors, issue the request for workshop proposals (OBTC is made of teaching development workshops, not research presentations), find keynote speakers, and add enough local color and culture that attendees will know something about the host campus and region before they are done. Financially, the conference is supposed to provide a net profit to the society of approximately $20,000 after all expenses, including subscriptions to the Journal of Management Education are paid.

(1) Volunteer vs. Professional Staff

OBTS relies on volunteers to run its conference. It tries to alternate between the East Coast and the West Coast of the United States, but for the 2005 and 2006 meetings, the only volunteers to come forward were from Scranton, PA and Rochester, NY. In 2007, the meeting will be in Malibu, CA at Pepperdine University. The downside to this reliance on volunteers is that the board gives up its ability to strategically choose locations based on what will best serve its members. The cost of air travel to remote locations in the northeastern U.S. means that many potential attendees will skip the conference, lowering attendance and making it hard for the conference to achieve its financial goals.

One solution to the over-reliance on volunteers is to use staff from the host university. Western New England College had an excellent staff member who helped the local arrangements coordinators immensely and did much of the behind the scenes legwork. She was familiar with campus facilities and had a lot of event management experience. She took on much of the logistical responsibility that a professional coordinator would handle, leaving the coordinators, who were faculty, free to focus on the conference program. Their solution to most operational issues was "have Linda take care of it."

Although my university has a director for conference programs, her job is to serve all of the conferences that come to campus, which is full all summer long with football camps, Methodist board meetings, and other activities. Her office could take care of OBTC while we were in residence but did not have the resources to manage the logistics running up to the conference.

Another solution to reduce the workload for faculty volunteers is to delegate work to a class in events management. Susan Herman did this successfully for the OBTC held at University of New Hampshire in Keane. I tried to replicate this innovation at my school, but I do not teach in the daytime undergraduate programs on campus very often and my elective offering did not have any enrollees.

This meant that the bulk of the logistical work for the 2004 conference fell on me as the local arrangements coordinator and not on students or on university staff, although I did have great support from our department secretaries. I did not receive a release from my teaching duties while the conference was being organized. OBTC did not pay my salary, but it did pay the catering staff, workers in campus housing, and other support personnel. In that sense the conference was not 100% volunteer run, but essentially, they received my coordination services as an in-kind donation from the University.

(2) University Host versus Local Arrangements Committee

Because of the daunting nature of the task, most conference coordinators recruit a team of volunteers to help. Our campus formed a team to handle paper submission and review, registration, graphic design, catering/logistics, and dormitory reservations. As the sole tenured faculty member on the team, the bulk of the responsibility fell on me. Because OBTS has no paid staff and uses campuses instead of hotels, many of the services that a hotel would provide must be provided by the volunteers. For example, hotels provide hangars, towels, soap, and drinking cups. We had to purchase these and provide them to attendees. Hotels will store exhibitors' shipments until it is time to set up in the exhibit area. Colleges do not have space for storage, so the volunteers have to find a place to store the exhibitors' boxes between the time they arrive and the time they are needed. Of course hotels charge for some of these services, but the exhibitors are used to that and take care of payment on their own. OBTC does not have a mechanism to charge for extra services.

Because we were the "hosts," we drew most of our volunteers from within the campus community. The exception was our reviewers, who came from the OBTS membership. Although we were hoping to have a team made up of faculty from lots of local schools, we were never able to make that happen. Pepperdine University will host the 2007 meeting. Wisely, the coordinator, Steven Sommer, has already begun recruiting outside help from other schools to help lessen the burden. They would be wise to recruit an event manager as well if one is available from their campus staff.

(3) Preserving organizational memory

Because new volunteers take over each year, much of what is learned one year does not get passed on. For example, the 2003 organizers had a sophisticated registration web site that shut down at the end of the conference so the 2004 group had to build a new page from scratch. This in turn, was not passed on to the 2005 team at University of Scranton. Ten years ago, Susan Herman, the coordinator for the 1996 conference in Keene, New Hampshire, updated a conference management handbook. Susan and other prior conference coordinators such as David Boje from New Mexico and Carol Sawyer from LaVerne, were available to provide advice and counsel, but often their advice could not be used or came too late in the process to make a difference.

The conference has several activities that occur before the official start of the meeting and add to the complexity. First, a T-Group meets from Sunday until Wednesday of the prior week. The leaders of this group assumed that it had the status of the rest of the conference, but it was, in fact, a completely separate event. Their demands for special breaks on pricing, room arrangements, and food were difficult to assimilate at times. A professional manager could have drawn up a separate contract for them explaining what they were and were not paying for and would have had an easier time drawing boundaries. As it was, the arrangements made one year may or may not have carried over to the next year, depending on how willing the local arrangements coordinator was to make them feel welcome. A coordinator who participated in the workshop would be more open to helping them than one who did not.

The second pre-conference activity was the meeting of the OBTS board. They had similar expectations of privilege and expected to get the best rooms, good food at local restaurants, and a quiet meeting place where they could conduct the business of the society. That business had very little to do with running the conference, from my perspective as coordinator. I found this a little disconcerting until I talked to a coordinator from another year. His biggest distraction was all the interference he got from board members who tried to second-guess him at every turn. Based on his experience, I was just as glad that they left us alone.

One innovation we attempted in 2004 was to add more pre-conference workshops to the program. We held several one day workshops, for which we charged an additional fee. Income from the fees was either paid to the organizer of the workshop or used to pay his/her conference registration. This allowed us to invite senior faculty such as David Whetten from Brigham Young University without paying directly for his attendance. Like many small conferences, OBTC has a policy of not paying for keynotes or guest speakers. Professor Whetten's theory building workshop brought in sufficient revenue to reimburse him for his travel and his conference registration.

Other changes in the program were minor and did not result in any permanent changes to the culture. We moved the OBTC banquet from Friday dinner to Friday lunch and moved their traditional talent night from a single venue "show" to a multiple venue "carnival." While this had the advantage of preventing attendees from being cornered in an auditorium or dining room during a truly riveting rendition of "Music of the Night" from "Phantom of the Opera," and freed them to enjoy poetry readings, African drumming circles, folk music, and drama simultaneously, some core OBTC members felt that the change was an assault on the culture of the organization that should not be repeated.

The core of the conference, teaching workshops held Thursday morning through Saturday noon, did not change from past years. We had about 65 submissions and were able to accept nearly all of them after a cursory blind review process managed by two of my colleagues, both of whom were new to the task. OBTS had no online reviewing capability, so everything was done via email in MSWord. This meant that everything had to be transferred manually to a database, which could then be used to generate the conference program. Overall satisfaction with the core of the program was very high.

Satisfaction appeared to be lowest with a plenary session that brought in senior scholars to talk about trends in the field. Several of them were white males who did not have much difficulty raising objections from some of the strong feminists in the group who were appalled at their lack of sensitivity to issues of power, gender, and race. This generated some lively discussion but the overall tone of the session seemed out of synch with the espoused values of the society and the conference.

The session came about because several senior members of OBTS approached me at the 2003 conference to see if we could "bring back some of the old sages" at next year's conference. I felt that this was a noble goal and asked them to organize the effort. I heard very little back for the next five months. Apparently, they assumed that I would take the lead, while I believed that, since it was their initiative, and since these were people with whom they had contact, they should make the arrangements. From an original list of 30 senior invitees, I believe they were able to salvage three or four. Their disconnect between vision and action was a telling one for the way the organization tended to work. Members of the board and senior fellows like to generate brilliant ideas, but these tend to get pushed down to the conference coordinator for execution, when he or she is already overloaded with millions of details.

Overall, the board and core members of OBTS serve as the institutional memory. They tell the conference coordinator to be innovative and try lots of new things, but seldom institutionalize locally developed innovations. It is a paradox that they seem unable to absorb change or to preserve lessons learned from past conferences.

(4) Size of the conference and methods used to manage it

One impediment to using more professional event management is the small size of the OBTC. It has been constant at 150 to 250 attendees for over 15 years. While the board takes some responsibility for marketing the conference, most of the onus falls on each year's coordinator. The Academy of Management has 16,000 members. Of those members and the 450 or so members of OBTS (some of whom are not members of AOM), less than 100 submitted proposals for the 2004 conference and less than 300 chose to attend. This lack of attention to potential markets comes from the board's belief that bigger is not better, and that a small, cozy conference is what serves its members best. One consequence of their "small is beautiful" philosophy is that the Academy of Management has added a similar journal called <u>Academy of Management Learning and Education</u> and is in discussions to begin holding a teaching conference of its own.

If the energy that OBTS volunteers put into running the conference each year was instead diverted to replicating it nationwide, the society could be holding as many as twenty regional meetings, each of about 200 attendees, which would reach a larger percentage of their potential market without hampering the small conference culture that they love. If those twenty conferences were heavily marketed, professionally managed, and operated at hotels instead of campuses, conference coordinators could use their volunteer hours to recruit top notch invited speakers and be more selective in which workshops got accepted, thereby improving the experience for everyone.

Reflections on OBTC

In order to feel fulfilled with the high level of volunteer commitment currently required, a conference coordinator must be a core member of the organization, someone who attends every year no matter what, and supports the conservative organizational culture that OBTC strives to preserve at all costs. As a sometime attendee with an interest in innovation and cross pollination of ideas from other conferences, the experience was not very rewarding and one I would hesitate to repeat. I will assist the 2007 team at Pepperdine University at the same time I am advocating for a different way of operating the conference. I was asked to run for OBTS president last year, but I am still a little burned out from the experience, so I turned them down. I have lots of innovative ideas but they would alter the organization beyond what its core members feel comfortable supporting. I am not committed enough to their process to proceed.

## THE WESTERN ACADEMY OF MANAGEMENT (WAM)

The Western Academy of Management is 46 years old, about the same age as OBTS, but with a culture that blends a focus on community and relationships with a focus on scholarship and academic achievement. WAM publishes the Journal of Management Inquiry, which focuses on non-traditional research, commentary on the field of management, and interviews with scholars who have made a major contribution to management thinking. Its editors like to claim that it is the "New Yorker" of management journals.

WAM is the regional affiliate of the Academy of Management for the Western United States and Canada. Fifty years ago, the name "Western" made it obvious that we were from west of the Rocky Mountains. That is no longer true in 2006. WAM members come from Europe, South Asia, Japan, and across the U.S. and Canada. WAM has held international meetings in Mexico, China, Peru, Japan, and Turkey as well as its North American meetings which have been held in locations such as Long Beach, CA; Las Vegas, NV; Anchorage, AK; Palm Springs, CA; Santa Fe, NM, and Sun Valley, ID. To be a member of WAM, you have just have to be from "west of somewhere else." WAM members believe that WAM is more about an attitude or state of mind than is about location.

### (1) Volunteer versus Professional Event Management

Like OBTC, WAM relies on volunteers to host the conference. These volunteers are known as local arrangements chairs. They are only responsible for logistics, not for the program. Program review and design falls on the program chair, which is an elected position with full board responsibility over a four year term. In 2006, WAM proposed a change in the four year structure so it begins with a post called Vice President for Innovation, followed by Program Chair elect, Program Chair, and President. A fifth year as Past President is optional. It can be filled by any prior president.

The local arrangements chair (or chairs if they form a team) work with the local hotel and the program chair to provide the catered meals and breaks, attract sponsors, organize a special event for Friday night, and recruit exhibitors. They handle on-site registration, help recruit local business speakers, and order audio-visual equipment. They work closely with hotel staff but have nowhere near the responsibilities that the OBTC coordinators have because the hotel staff handles a lot of behind-the-scenes activity. For example, even though audio visual equipment is "free" on campus to OBTC, someone has to arrange for delivery and pickup and be available when equipment fails. Staff time becomes part of the host institution's contribution to OBTC, whether they like it or not. WAM tries to borrow some equipment from local institutions, but more and more, it asks its members to bring special equipment if they need it because hotel pricing has become prohibitive, especially for data projectors.

WAM does not need to make a profit on the conference, so their goal is to break even. The conference coordinator works with the WAM treasurer to make a budget. Credit card income goes directly to the central WAM account. Cash income is usually deposited in a local account that is liquidated after all conference bills have been paid.

Sometimes events beyond the control of the local arrangements team can blow the budget, but this is rare. For example, the 2006 hotel contract set a very high minimum for the number of room nights that had to be filled by late February in order for WAM to have free use of the meeting space. The contract, signed several years ago by the previous treasurer, did not account for the large number of attendees who live close enough to the venue to go home each night rather than stay in the hotel. The hotel received additional payment from WAM for the meeting rooms and still sold the guest rooms to other customers. WAM attendees who booked late had to pay a much higher rate and WAM did not get credit for the rooms, although it might in future negotiations.

WAM uses a broker to get better deals on room rates and gain access to more hotels. The broker receives a commission from the hotel for each room sold but has little downside risk if the conference does not book sufficient numbers. Presumably, the broker has knowledge of more properties. Ultimately, however, it is the WAM treasurer (also a volunteer) who must make a best guess estimate about future demand for the conference and renegotiate if conditions change.

**(2) University Host versus Local Arrangements Committee**

WAM has never been hosted by a university in the way OBTC has. Usually, a single local arrangements chair puts together a group of volunteers from his or her institution and neighboring schools. WAM has no fixed procedure for making this happen; it is all left up to the local chair. One advantage of this arrangement is that it gives the local arrangements person flexibility to choose an interesting site for the conference in neighboring cities or resorts such as Palm Springs, CA; Banff, Alberta; or Sun Valley Idaho. Usually the local arrangements chair's institution is listed as a major sponsor in the conference program whether or not any cash changes hands. This recognizes the time commitment that the local arrangements person has put into the conference, which can add up to hundreds of hours.

WAM has yet to try the third alternative, using professional events coordinators. WAM's treasurer has found volunteers for 2007, 2008 and 2009, so the earliest they could make the switch is for 2010. He would like the conference to return to Hawaii, where WAM has little to no local membership. Using a professional coordinator will make that possible. WAM could still have a local arrangements volunteer to work with the professional staff, but that person would not have to be based in Hawaii.

**(3) Preservation of Lessons Learned while Encouraging Innovation**

Although WAM offloads much of the local coordination task to the hotel, the use of volunteers results in the loss of lessons learned from year to year, just as it does for OBTC. Although WAM has a document on how to run an outstanding conference, no one ever gets around to updating it

When a volunteer does a good job with local arrangements, it puts him or her in a good position to run for the WAM board. This year's coordinator was elected to the program chair/presidential track, as I was in 2003. I began my term as past president on April 1, 2006.

Although I worked nearly as hard organizing WAM as I did on OBTC, I found the experience much more rewarding. I had been attending WAM every year since 1989. I was (and am) part of the core membership of the group. I embrace the core values of WAM and genuinely believe in its balance between the task of scholarship and building solid relationships via the conference. I already knew the key players in the organization and knew that if I had an innovation to suggest, WAM would embrace it if at all possible. As local arrangements chair, I did not make any innovative moves the way I did at OBTC. I did not feel that I needed to because I was happy with the conference as it was. The 2003 program chair, Tom Mayes from California State University, Fullerton, made some choices for speakers that I would not have made, but those choices did not dampen my enthusiasm for volunteering.

I simply chose to have different speakers and plenary activities in 2005 when I was program chair. For example, instead of an opening panel discussion, I asked my colleague, Teri Tompkins, to honor our friend and mentor Peter Frost by repeating a learning exercise Peter had done previously. We wanted Peter to come himself, but sadly, he passed away the previous winter. Teri's exercise asked us to view a video from "Karate Kid" in which the karate master makes the student stand in the bow of a rowboat while the master rocks it. We were asked to reflect on how we maintain balance in our lives. The exercise had the benefit of putting us all in the moment while honoring the memory of a beloved colleague. It was a different choice from the one Tom Mayes made the previous year, but it was still an acceptable choice for WAM.

Looking back at differences between WAM and OBTC, it was clear that most of the innovations I tried at OBTC were ones that made them look more like WAM, but nothing that would have substantially changed or improved the fundamental working of the conference.

My experience with WAM was quite different. In the fall of 2003 I attended my first WAM board meeting in Edmonton, Alberta as Vice President and Program Chair elect. This was prior to running OBTC but after I served as local arrangements chair for WAM 2003 in Palm Springs. I had an idea to transfer a program component from the North American Case Research Association (which I attended as Western Representative in 2002, 2003 and 2004) and from the Western Casewriters Association (which meets the first day of WAM every year). I suggested that we add a track to WAM for papers that were rejected from other venues, such as journals or conferences. Within seconds, the other members of the board took hold of the idea and expanded it into support for the entire research pipeline. Together, we crafted language that would invite submissions of incubator ideas, "revise, resubmit, or rejected" manuscripts, or ideas for grant proposals. Papers would not have to be original to WAM. Authors could send their reviews along, too, with an explanation as to why they were stumped on how to respond. The purpose of the pipeline track was to encourage them to move their work down the pipeline. This was in contrast to the usual conference procedure, which is to either reject fifty to seventy percent of the work submitted and call yourself exclusive, or accept everything and get the reputation of having no standards. We distributed the expanded call for papers after the 2004 meeting in Anchorage and waited to see what would happen.

We received only a few pipeline paper submissions the first year. The concept was still new for most participants and our publicity about the new track was not extensive. I made an executive decision as program chair: I decided that we should move all of the conference submissions that were below the median in reviews to the pipeline track and populate the sessions with our own "revise and resubmits." The board was a little unsure of this move, but allowed me to proceed in order to see what would happen. We contacted all of the authors and sent them copies of the other papers that were at their pipeline tables with instructions to read them and be prepared to provide the authors feedback. The first day of the conference, we filled a ballroom with pipeline tables. Those who had not understood our email instructions quickly caught on, and the conversations began.

The following year, over half of our submissions requested pipeline status. Once again, a few participants were confused, but most of them were anxious to go to work. In 2007, the program chair will most likely move the start of concurrent sessions back at least half a day so that pipeline sessions can be integrated across all three days of the program. We will also work on inviting authors of articles in the Journal of Management Inquiry who were invited to revise and resubmit to bring their manuscripts to WAM.

My experience with this innovation at WAM was completely different from my experience trying to make changes at OBTC. First, I was part of the core group instead of the periphery. Second, the change was consistent with WAM's core values and extended them rather than threatening them somehow. Third, the innovation helped WAM break the impasse between increased participation and decreased quality. In the past, program chairs had only one means to increase participation: accept a higher percentage of papers even if they were of poor quality. Now the distinction is blurrier. Papers that get accepted for concurrent session presentations should get better reviews, which means that they further down the pipeline that runs from research idea to peer reviewed publication. Feedback from the attendees in 2005 and 2006 was very positive toward the concurrent sessions and toward the pipeline sessions. The incentive for participants to send partially completed work to the conference is high, but they know that they most likely won't be presenting in a concurrent session (or they request pipeline status up front). In most academic groups, only a small percentage of the membership goes to the trouble of submitting a research paper. Instead of slamming the weaker papers, we encourage the authors to come to the conference and get help from their peers.

**(4) Size of the conference and methods used to manage it**

WAM has been stable in size over the past 15 years, varying from 150 to 225 attendees depending on the location. Like OBTC, its core members are generally happy with the size of the conference because they believe that getting larger would result in a deterioration of WAM's core values of collegiality and innovation. A move to more professional management might bring about growth. It certainly would free more volunteer hours towards marketing the conference. It might also result in lower costs for attendance, or at least a slower growth in the costs. Until recently, the WAM board believed that it was too small to afford professional staff. While WAM cannot afford a full time executive director, contracting with an event coordinator who manages WAM in conjunction with many other events would be very different from hiring full time staff to run the whole organization. WAM currently has a part-time database manager and a part-time web master. The journal employs doctoral students to help manage the publication flow. It remains unclear whether they will consider professionalizing conference operations as well, but the opportunity is certainly before them.

**Reflections on WAM**

Seeing the rest of the WAM board take ownership of the pipeline idea by naming it, making it grow, and then implementing it a second year in a row was very rewarding and motivates me to continue volunteering with WAM, even though it can be stressful at times. My next initiative will be to help WAM to improve its marketing to potential members in the region. The primary tension in that effort will be to balance preservation of WAM's playful, innovative culture with bringing more participants into the conversation. As that effort begins to succeed, they will have time to consider the move to more professional management of local arrangements.

## THE NORTH AMERICAN CASE RESEARCH ASSOCIATION (NACRA)

The North American Case Research Association holds its annual meetings in the US and Canada. Unlike the other conferences I have described, NACRA is much more interdisciplinary. Each fall, it welcomes about 200 case writers from business, political science, and education disciplines to a resort hotel in a nice location such as Cape Cod, Massachusetts. I attended the conference in 2002, 2003 and 2004 in Banff, Alberta; Tampa, Florida, and in Sedona, Arizona. It mixes writing workshops with paper feedback sessions and conventional style symposia with an occasional research presentation. Like OBTC, one purpose of the conference is to help its participants gain respect for what they do that may be lacking at their home institutions. While some OBTC participants seek respect for their choice of discipline and for their interest in teaching performance rather than conventional quantitative research, some NACRA participants seek validation for their work researching teaching cases and teaching notes, which are elaborate instructor guides for teaching cases.

To that end, NACRA has a detailed set of research standards for cases and a publication, the Case Research Journal, which only accepts cases for publication that meet those standards. Cases based on videos, secondary research, or hearsay evidence do not meet the standards. Ideally, the researcher conducts extensive interviews and observations inside the target organization and follows rigorous documentation processes so that the management of the target organization will give permission for the case to be published, even if the name of the company is disguised. Cases at the conference are not ready for publication, and some never will meet CRJ's high and somewhat rigid standards. Nevertheless, the writing workshop format is invigorating and gives participants lots of suggestions for improving their writing.

**(1) Volunteer versus Professional Event Management**

Like WAM, NACRA uses a volunteer local arrangements chair and an elected program chair. Unlike WAM, the NACRA board chooses its future locations whether or not it has a local contact to run the conference. The Local Arrangements Chair for the Sedona meeting was based in Nebraska, but she did an excellent job working with the hotel and pulled off an excellent conference. As of this writing, NACRA has not considered using professional events managers.

**(2) University Host versus Local Arrangements Committee**

NACRA uses hotels and conference facilities for its conferences not local universities, so it looks more like WAM than OBTC. Since it draws from across many disciplines including business, education, and political science, its local arrangements chair could be from any of those disciplines. Like WAM, NACRA uses a broker to help book hotels but after that the faculty volunteer takes over. If a university is listed as a sponsor, it is most likely one where the program chair or local arrangements chair teaches, or it is a school that has big case catalog for sale.

**(3) Preservation of Lessons Learned while Encouraging Innovation**

I was the Western US regional representative to the NACRA board from November 2002 until November 2004 and joined their strategic task force my second year. The task force was chaired by the president elect and included several members of the board, including NACRA president, J. David Hunger, author of Wheelen and Hunger [2]. We met monthly via conference call over the 2003-2004 school year and reported our results to the board at the fall 2004 meeting. I was impressed with their clear vision for the organization and did not see any major opportunities for innovation at the program level, other than a major re-definition of what constitutes a case that would have been at odds with their rigorous culture of case writing as a research activity rather than as part of teaching.

On the logistics side, NACRA hands off local arrangements every year, the same way WAM does, so the issues of institutional memory may be similar. Since I have not been a program chair or local arrangements chair for NACRA, I do not have as much insight into their operations. Further study will be needed to learn more about how they preserve their lessons learned.

**(4) Size of the conference and methods used to manage it**

NACRA's major weakness lay in the area of marketing. Like WAM and OBTC, NACRA was a small, intimate conference. At the same time, its potential audience of case writers was even larger than the 16,000 members of the Academy of Management because it included all of the other business disciplines as well as political science and education. Unlike WAM and OBTC, NACRA faced stiff competition for cases from Harvard Business School Press, the Darden School at University of Virginia, the Ivey Business School at the University of Western Ontario (Canada), as well as textbook authors who are always on the lookout for new cases.

Like WAM, NACRA seems to have a limited attendance but I am not sure that they want to stay that way. Their 2005 conference had just 150 attendees. They have a volunteer marketing coordinator who helps them sell more cases, but no one to sell the conference. As with WAM, use of a professional event coordinator might free more volunteer time to improve conference attendance through better marketing.

**Reflections on NACRA**

NACRA has been reasonably successful at sustaining its conferences, but its growth is limited by its volunteer base. In March 2006, I volunteered to be a track chair for the Human Resource Management and Organizational Behavior Track at the 2006 conference. This is not a board position, but it allows me to stay involved at a reasonable level of volunteer commitment. At some time in the future, I might run for their board, but not until I have some idea of what they need to do differently to develop as an organization, such as switching to professional event coordination and ramping up a more significant marketing campaign to identify more case researchers and bring them into the NACRA network.

## THE ACADEMY OF MANAGEMENT (AOM)

The Academy of Management is the largest international academic association in the management discipline. It is divided into multiple divisions and interest groups. About ten years ago, it finally hired a professional executive director who supervises a small paid staff located at Pace University in New York. With 16,000 members, many of them international, and an annual meeting with several thousand participants, it is easy to get lost at the Academy. I first attended the annual meeting in Washington, D.C. the year I joined WAM. The next year I attended the conference in San Francisco, but after that I only attended intermittently, usually when it was within driving distance from my home. Until the Denver meeting in 2002, I never felt like I connected with the Academy. If I was lucky, I would run into some of my network from WAM, but most of the time we missed each other in the crowd. During the three years I did not attend, between 1998 and 2002, one of the newer divisions, Management Education and Development (MED), began to gain influence and get a larger share of the meeting.

MED became a home for the scholarship of teaching and for the kinds of conversations I was used to having at WAM and OBTC. One of my OBTC colleagues, Regina Bento, invited me to run for their board at the 2002 meeting. Assuming I would lose, I agreed and soon I found myself serving as "research chair elect." My job was to run the best paper awards in 2004 after shadowing Laurie Milton, who would handle the awards in 2003. I was immediately drawn to the core MED group which includes a huge board of elected and appointed members. MED innovations have given the division lots of recognition for AOM as a whole and several seed grants for other initiatives. One such initiative was a participative strategic planning process that I assisted with after the Seattle meeting. I later used a similar process at WAM's 2005 and 2006 meetings to involve WAM members in long range visioning and short range planning.

**(1) Volunteer versus Professional Event Management**

The Academy of Management uses a combination of paid staff, volunteers, travel agents, and event coordinators to bring off a large and very complex conference every year. The MED division chair and program chair receive an allotment of meeting space in the conference hotels. They have their own financial resources to pay for receptions, pay for recognition plaques, and cover other expenses. They do not have to worry about many of the logistics issues because these are handled centrally. The program chair has a year in training operating the Professional Development Workshops before tackling the main program, then serves another year as Division Chair. The job is big, but not as overwhelming as running an entire conference would be.

(2) University Host versus Local Arrangements Committee

The AOM program lists a local arrangements committee each year. The committee is made up of members from a number of institutions, some of which may not be physically located close to the conference site. They work closely with the professional staff and the hotels to make the event a success. The program is so large that it must encompass several hotels and sometimes spills to a convention center. The MED Division typically holds all of its events in a single hotel, but does not have to handle any of the contractual arrangements. All of that is done centrally by AOM, leaving MED leadership free to concentrate on the program.

**(3) Preservation of Lessons Learned while Encouraging Innovation**

The core of MED's leadership is the professional development chair/program chair/division chair track. AOM uses a combination of professional event management and local arrangements volunteers so the MED leaders only have to deal with the logistics of their particular tracks. AOM assigns them rooms based on the percentage of total submissions received by the division compared to the academy as a whole. MED leverages its space by creating lots of collaborative sessions that share slots with other divisions, thereby increasing its presence in the program. The Academy encourages such cross division cooperation.

Other MED innovations include an online "boot camp" for new teachers. Like members of other AOM divisions, MED members can participate in an MED listserv and have access to an MED web page.

The MED Division Chair track lasts five years from start to finish. This gives future chairs lots of time to learn and keeps predecessors around to pass on their expertise. The academy has now centralized its online reviewer system so that all the divisions are using the same web based review process. This makes a huge contribution toward keeping procedures consistent across divisions and from year to year. In addition, MED uses evaluation forms for every workshop and paper presentation to gather information that will inform planning for the following conference.

**(4) Size of the conference and methods used to manage it**

MED benefits by being part of a larger conference structure. It gains economies of scale that are not available to WAM, NACRA or OBTC because it is part of the much larger AOM structure. At the same time, it only receives a small percentage of total submissions to the conference, which means that an even smaller percentage of AOM members are participating in the work of the division. Clearly, using professional event management does not eliminate the need for strong marketing for the conference. One successful marketing strategy is MED's creation of "Country Liaisons." Every time a new AOM member comes to MED from a different country, the board appoints him or her to be the liaison to that country, promoting the work of MED there. Because they were asked to be involved in a small way, they increased their commitment to MED and came back in future years to serve in other leadership positions.

Reflections on MED

The MED division does an excellent job rewarding its volunteers through recognition and praise. It has a strong pipeline of future leaders and ongoing participation from past division leaders. I would like to run for division chair but I want to wait until I have something innovative to contribute before I attempt it.

## THE INSTITUTE OF BEHAVIORAL AND APPLIED MANAGEMENT (IBAM).

IBAM is a relatively new group, only fourteen years old in 2006. In addition to their annual conference, they produce Journal of Behavioral and Applied Management (JBAM). They pride themselves on creating a supportive atmosphere that welcomes newcomers and encourages submission of research at every stage of development.

**(1) Volunteer versus Professional Event Management**

When I presented at the 2005 conference, I was surprised to learn that their local arrangements are handled entirely by a travel agency based in Colorado. The agency specializes in booking and managing trade shows and sales conferences for corporate clients across the Western United States. Their corporate clients book meetings in the same hotels year after year, giving them an excellent credit record as well as first hand experience as to which hotels have the best service and the best rates. Because the travel agents come to Scottsdale often, they were able to get a preferred rate on the hotel and the meeting rooms. They knew where to find fun activities for the optional off-site dinner (We wound up at a frontier town movie set theme park that was kitschy but lots of fun).

IBAM used lots of volunteers as officers, program chair, and track chairs, but no one had to miss the conference because they were handling registration or logistics. The professional staff handled all the behind the scenes activities. The travel agency got paid in three ways: (1) They received a commission on each hotel room occupied by IBAM participants, just like a hotel broker would; (2) They took a ten percent commission from each conference registration; and (3) they were reimbursed for the direct expenses of their two staff members to attend the conference such as air fare, meals, hotel, and ground transportation. They ate with the conference attendees most of the time so meals were not a big expense.

**(2) University Host versus Local Arrangements Committee**

IBAM is unique among the conferences I discuss in this paper because it has neither a host institution nor a local arrangements committee. All of the conference logistics are handled by their travel agent. The position of local arrangements chair does not exist in their organization. The role is filled by the events team from the travel agency.

One drawback to this approach is that no one from the conference is familiar with the local area, so getting sponsorships from local schools could be difficult. One possible solution is to get sponsors from a wider geographic area, including board members' home institutions. Another solution is to form a local arrangements committee, but give them very little day-to-day responsibility. This would increase their involvement without overloading them as volunteers.

**(3) Preservation of Lessons Learned while Encouraging Innovation**

IBAM members got to enjoy a worry-free conference knowing that they got the best possible rate for their hotel rooms. Savings on rooms alone could pay the cost of the management fee, especially if the agency helps avoid going under the minimum hotel reservations promised as WAM did in 2006.

Because event management is all they do, the travel agents build experience year after year instead of learning one year and handing responsibility off to someone new the next. Even if they experience some staff turnover, event management expertise will come with whoever is hired as a replacement.

**(4) Size of the conference and methods used to manage it**

The biggest advantage the travel agency has over volunteers is that they are in and out of hotels in various chains all year long serving their other clients. The only other way to achieve the kind of clout they get would be to ally with other academic disciplines and hold your conferences at the same time and the same hotel. The Southwest Academy of Management is part of Federated Business Disciplines, a group of six other academic conferences that all meet together at the same time. Unfortunately, FBD decided to go national and tried to outgrow its regional roots. This lead to conflicts with some member groups which were specifically chartered as regional gatherings. FBD scheduled its 2006 meeting in San Diego, which puts the Southwestern Academy of Management in the Western Academy's territory. Fortunately, WAM is already aware of the anomaly and is tolerant of the situation. The Southern Management Association was also in a consortium but it eventually split with its partner. So although the idea of finding partners is attractive because it helps gain economies of scale and attract more exhibitors, the costs may exceed the benefits. If all of the academic disciplines in a region used the same event managers, they could achieve similar economies of scale without having to adjust their meeting schedules to the exact same dates. Another option is to string several conferences together in a row with the same location and the same exhibitors. This works for small groups that tag onto larger international meetings. It is not clear to me how this could work for regional groups like WAM.

IBAM is still very small but I do not know if its board is comfortable with the status quo. They have not used the resources freed from local arrangements duties to recruit more attendees at the conference. In this case, a very small conference was able to afford professional event management. Most conferences of this size rely entirely on volunteers. IBAM's experience suggests that small size need not be a deterrent to use of professional assistance.

**Reflections on IBAM**

IBAM uses its travel agent to choose any location it wants for the conference, independent of where its volunteer base is located. It gets good deals on fine hotels by being part of the travel agents' family of events and benefits from being part of a larger buying group with only small transaction costs to participate. The travel agency has become a true business partner, understanding their culture as an organization and seeking venues that will be pleasing to them and within their budget. All of this happens year after year without burning out IBAM's limited volunteer base. While it still has many of the same marketing issues as NACRA, WAM, and OBTC, it has volunteer muscle available to work on the issues because the local arrangements task is being cared for by experts.

## A VISION FOR THE FUTURE OF ACADEMIC CONFERENCE MANAGEMENT

This reflection on conference management has led me to recognize several dimensions that organizers of academic conferences should consider in structuring their activities:

Academics are not professional event organizers. Some of them may be better at the task than others but on the average, a professional working at managing your event year after year will outperform volunteers who turn over every year.

By outsourcing local arrangements, conference organizers free volunteer time for two important tasks: program innovation and conference marketing. Both of these tasks are essential for the long-term health of a conference.

Increased marketing efforts will be necessary to learn who is funded and why and to broaden each conference's reach by getting more schools to fund attendance. More research is needed to learn what criteria schools use to determine which conferences faculty can be paid to attend and why.

Over reliance on volunteers to perform local arrangements tasks results in risky inconsistencies in performance and a higher chance that a conference will lose money in a given year due to circumstances that a professional would have foreseen but a volunteer would miss.

Using a professional event manager such as a travel agency with multiple clients makes your conference part of their buying group and reduces your costs over time. While the professional appears expensive up front, your backend savings could be considerable.

Volunteering to run an academic conference at the local arrangements or at the program level requires huge amounts of commitment in time and dedication. Academic organizations should screen volunteers for key posts carefully to ensure that they are committed to the values of the organization but can still bring innovative new ideas forward. Volunteers without a strong knowledge and belief in the organization's core values are less likely to feel well supported by the board or the members and are more likely to burn out.

Board members and program chairs who have previously volunteered as local arrangements coordinators are more likely to support the switch to professional conference management than those who have not. It is always easy to volunteer someone else's time when you have never attempted a job yourself. Not everyone will find the right professional management team as IBAM did. It may take a few iterations. As with any outsourced task, clear performance expectations and good contracts are essential. It is not that volunteers cannot be held accountable, but it can be difficult. Good professionals will bring evaluation tools with them and expect to get feedback that will help them improve their performance in the future.

Small academic organizations that operate annual meetings must find new ways to market themselves if they are to survive. It is no longer enough to be a regional affiliate of a larger group, or to define yourself as "Not those guys." Academic groups must conduct detailed analysis to find their core participants and increase their commitment. At the same time, they must identify participants on the periphery and reduce the barriers that keep them from becoming part of the core.

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