Framework for Conference Policy and Planning
School of Engineering
Santa Clara University

A.　　Statement of purpose

Hosting conferences on SCU campus provides numerous benefits. By showcasing the School of Engineering, we can attract top talent in the field and strengthen our reputation as a leading institution. In addition, conferences create opportunities for exchanging current developments in research and other topics with the SoE/SCU community, as well as with the wider national, international, and regional academic community. This allows for the dissemination of valuable insights and the cultivation of a culture of academic excellence. Our goals for hosting conferences on campus are threefold:

1. we seek to expose our faculty and students to current research trends and developments in their respective fields, providing them with valuable insights and fostering their intellectual growth.
2. we aim to promote collaboration and innovation by sharing these advancements with a wider audience, including students, faculty, and professionals from neighboring institutions, industries, and beyond.
3. we recognize the value of hosting secondary conferences as a means to benefit the local community. Through such events, we have the opportunity to make a positive impact on the local community while also promoting the School and the University.

B.　　Overall considerations

·　　*Criteria for hosting*: to showcase the School of Engineering, we should actively seek out international, national, and regional conferences that can highlight our exceptional faculty, programs, research, and expertise, as well as the impressive STEM facilities and the broader university as a whole.

·　　*Frequency and timing*: It's recommended to limit the number of events to three per year to accommodate space restrictions. For the best availability, multi-day conferences during spring break, summer quarter, and weekends are ideal. It's important to establish an event calendar for better organization.

· *Funding*: Dean's office is committed to providing financial support of up to $10,000 per year to aid in organizing these events, with up to $5,000 for any one conference. The amount of funding needed will depend on various factors, including the conference type and intended audience. Typically, student-focused conferences tend to have lower registration fees and may require a sponsorship of up to $5,000. National conferences may offer opportunities for co-sponsorship with other institutions, which can help to reduce costs for SCU. Additionally, securing industry sponsors through exhibition is a promising option. We strongly encourage organizers to explore these possibilities and other potential funding sources to ensure that conferences are as cost-effective as possible.

· *Space*: the SCDI space is our top preference for showcasing our facilities, and the Sordello courtyard is a great option, particularly during spring and summer. Coordination with Dan Ignacio is necessary to ensure space availability within SCDI. Other options include the Locatelli Center, Benson Center, Learning Commons spaces (such as the St. Claire room). For larger conferences, Mayer Theater and Recital Hall are excellent options to consider.

· *Conference management*: we propose a collaborative model for conference planning, where a faculty organizer will be responsible for overseeing the overall management of the event, with the assistance of a dedicated student helper. In addition, the administrative staff from the hosting department or the Dean's office may offer additional support, as resources permit.

· *Marketing and outreach:* marketing and outreach efforts for these events will be led by SOE's Marketing and Communications team. The events present valuable opportunities for showcasing the undergraduate and graduate programs and highlighting the full range of our academic offerings including interdisciplinary programs as well as any new online programs overseen university-wide. To ensure a successful outcome, the assistant deans of these programs will be involved and may provide on-site assistance as needed.

C. Preparation before hosting a conference

To ensure a successful conference, a thorough review of the proposal request or a solicited conference proposal is necessary before agreeing to host. When determining the funding required for the conference, several key factors need to be considered, including the availability of external funding, for example, if partial industry support has been secured through sponsorships or industry exhibits and booths. Exploring fundraising opportunities, such as initiatives from the sponsoring faculty member,

host department, Dean's office, or Corporate/Foundation Relations (CFR), is also helpful, provided that the funding level and ROI make sense for CFR to pursue.

In addition to these considerations, it is important to confirm that the SoE has the necessary capacity to accommodate the basic logistical requirements, such as space and dates, for the proposed conference. It is also essential to determine the level of administrative support that the conference secretary and association will provide and whether it will be sufficient for the SoE to effectively manage the administration and logistics of the conference. By taking these factors into account, we can determine the appropriate level of funding needed to support the conference and ensure a successful event that meets the goals of the SoE.

D. Upon agreement to proceed -- administration and logistics

To ensure availability of space and adequate time for planning, it is crucial to initiate the calendaring process at least a year in advance. During conference planning, several factors should be considered, including space availability, timing, duration, venue requirements, staff support, and potential keynote speakers. Careful consideration of these factors will ensure a successful and well-organized conference.

Faculty hosts at SCU should reserve meeting space well in advance, considering the limited space available in SoE facilities, including SCDI. In case of unavailability, other spaces such as the Mayer Theater may be rented at an additional cost. Before renting any space, the faculty host(s) should provide a detailed description of the timing, duration, and space requirements for the venue in writing. It may also be useful to identify a dedicated student helper early on in the project and explore any additional staff support available from the host department or the Dean's office.

Furthermore, it is advisable for faculty hosts to communicate with the Dean's office in advance to check the Dean's availability to deliver the conference's opening address. Additionally, if appropriate based on the group of speakers, attendees, and invitees, inviting other key SCU individuals such as the university president, provost, trustees, or Engineering Advisory Board to participate or give brief opening remarks could be beneficial.

Additionally, there are several other considerations that should be kept in mind during conference planning:

- · Travel: For regional/national or international conferences, it is important to decide whether the conference organizer will manage travel for all attendees and guests and handle the travel arrangements and costs for invited keynote speakers.

· Exhibits: Determine whether exhibit/booth or poster areas are needed and where they should be located.
· Tours: If tours of local industry or other sites of interest are planned, consider the transportation and logistics involved.
· Guests: Are there accompanying guest/spousal programs/events planned, and VIP guest arrangements required?

Other logistical requirements that need to be planned and budgeted include:

· Marketing and collateral considerations, such as creating and managing the conference website and digital media, designing and producing signage, banners, and posters. This may also involve press releases, media outreach, scheduling and managing media interviews, and responding to media inquiries.
· Catering, including reception and meals (breakfast and lunch), refreshments for breaks, and non-food items like linens, centerpieces, and signage.
· Overtime pay for conference management and logistical support personnel, if the event occurs during a weekend, including registration check-in, A/V support and media services, as well as facilities support like chairs, tables, podium(s), power, set-up and tear down.
· Parking and transportation arrangements, especially if tours of local industry or other sites of interest are planned.

E. Contact information

The following is a list of contacts for above mentioned support/services at SCU.

· SCDI facilities manager: Dan Ignacio

· Marketing and event planning: Nicole Morales and Shane Wibeto

· Locatelli Center, Benson Center: reserve through Ad Astra

· Learning Commons spaces/St. Claire room: https://www.scu.edu/is/lctcl/stclareusepolicy)

· Mayer Theater and Recital Hall: For information and reservations, contact the Performing Arts Center office, headed by Butch Coyne (408.554.4073, bcoyne@scu.edu).

· Parking: contact Leah Nakasaki-Peterson (lnakasaki@scu.edu), Assistant Director, Parking & Transportation Services

· Facilities: Chris Young (cyoung@scu.edu, 408-554-4875); Assistant Director, Buildings & Grounds

· Media services: MediaServices@scu.edu, (408) 554-4520

· Bon Appetit/Catering: https://scudining.cafebonappetit.com/catering/