



Conference Planning and Management: Challenges, Opportunities, and the Future

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Conference planning and management is a major task that requires a dedicated team of people. Many challenges can occur in conference and academic event planning that can confound organizers who are planning their first event to people who have been planning events for years. This article expands on identified challenges and proposed solutions from a forum of JALT conference organizers. It also explores the future of event planning with the framing that conferences post-pandemic will involve different expectations that include implementing new features that balance the latest video conferencing technology while supporting the unique advantages of in-person professional development.

The *Postconference Publication* features articles exclusively authored by attendees of the JALT2023 International Conference in Tsukuba. This conference was made possible through the tireless efforts of a dedicated team of volunteers, whose planning and preparation were paramount to its success. The *PCP* is proud to present an article about conference planning written by Wayne Malcolm, the Director of Conference for JALT International since 2019. For those curious about the behind-the-scenes, this article will provide insight into the successful large-scale event planning process.

学会の企画・運営は、専任のチームを必要とする大きな仕事です。学会や学術イベントの企画には、初めてイベントを企画するオーガナイザーから、何年もイベントを企画してきた経験者までが戸惑うような多くの課題が起こりうる。この記事では、JALTの大会オーガナイザーによるフォーラムで明らかになった課題と解決策の提案について解説する。また、パンデミック後のカンファレンスには、最新のビデオ会議技術をバランスよく取り入れながら、対面での専門能力開発のユニークな利点をサポートする新しい機能の実装を含む、異なる期待が含まれるという枠組みで、イベント企画の将来を探る。

The overarching purpose of JALT as an organization is to bring language educators together and provide opportunities for community and collaboration. JALT's mission is to “promote excellence in language learning, teaching, and research by providing opportunities for those involved in language education to meet, share, and collaborate” (NPO JALT, n.d.). One way to implement this mission has been through hosting professional conferences. JALT is a big-tent organization and community that is many things to many people. While there are member interests to serve - the conference allows for members to receive training and experience insights from all areas of the language education field - the reach of the conference goes far beyond the JALT members because it is equally welcoming to nonmembers (Etzion et al., 2021). The value a young or veteran academic can find in going to a conference may be a subjective one, but for JALT conference planners the objective is to provide an event and experience where participants can maximize opportunities to develop themselves through disseminating important information and techniques. The hope is participants will build and expand networks that will benefit not only the individual self, but also a community (Fisher & Trautner, 2022).

The earliest beginnings of what we now recognize as the Annual JALT International Conference and Educational Materials Exhibition, started in 1975 at a conference in Odawara, Japan (see <https://jalt.org/main/history> for a more complete history). During that event language teachers not only developed the idea of JALT as an organization, but also began using the conference model as a central event that could connect and develop association members and nonmembers alike. Over the decades JALT's conference and educational materials exhibition has brought together people of all types, from all across



the world, who populate the field of language education, from educators to learners to material developers. Executing such a large-scale event takes a tremendous amount of preparation and human resources. This paper will include precise challenges those in the industry of conference organizing and event management may have faced or will face. Along with the challenges, possible solutions will be proposed, as well as future directions for research into how best to design and execute conferences. This paper is not limited to conferences for those in the language education industry but can be of interest to anyone who is responsible for creating and providing professional development opportunities for their constituents.

My Experience

Since 2019, I have been the lead organizer of JALT's Annual Autumn International Conference and Educational Materials Exhibition. Before that I was the JALT Business Manager, who interacted with the publishers, universities, and other industry leaders who sponsor various activities within the JALT organization.

The official role I hold is Director of Conference. As a member of the JALT Board of Directors, the Director of Conference is nominated and elected by the general members of the organization. The responsibilities of the position are quite numerous, but another person in a JALT leadership position once told me, "Congratulations, you are now responsible for 50% of the JALT budget" (personal communication, 2019). This is important to illustrate and understand because the Director of Conference sits squarely at the intersection of JALT's mission as a non-profit entity providing high-quality professional development opportunities to its constituents and a large organization that needs to remain financially solvent by making money. Without adequate cash flow, JALT, as it currently stands, cannot exist.

To some, this position may look like a full-time job that merges the roles of human resource manager, business manager, and conference manager. I am no stranger to this environment, as I worked in conference planning prior to coming to Japan in 2002. However, I have also been a full-time English language teacher since arriving in Japan; conference planning and managing is really a part-time volunteer job.

The Forum

During the conference, I facilitated a forum about conference and event planning with the purpose of bringing together people who wanted to talk about the intricacies of this topic. It was open to anyone who was interested in it, or perhaps someone who may have

to deal with planning a conference. Those who attended were various members of the JALT conference planning staff, some with many years of experience, and others who were volunteering for the first time. There were also people who would be responsible for organizing a conference of their own.

To clarify, when I say conference, I do not only mean a large-scale multi-day event like JALT's annual international conference. I include shorter programs and meetings. They can be in physical spaces like a classroom, large hall, or even online. This is why the term "event planning" is more appropriate because the actual process of planning an event is fairly consistent. The scale and complexity, of course, change with the size of an event, which poses certain challenges, but by in large, the process one needs to understand - developing a theme, organizing a program with appropriate speakers and or presenters, arranging a venue, getting staff, publicity, executing the conference, collecting and analyzing reflections, and securing necessary funding - will remain the same across event types. The following section, however, does not necessarily analyze the process. Instead, it presents the challenges that arise during the process of planning an event.

Challenges

During the forum, the following five challenges were raised:

- Clear lines of communication;
- Getting good input data;
- Ethics of blind vetting;
- Speaker coordination; and
- Optimizing human resources.

These were not exhaustive challenges. Etzion et al. (2021) identify other challenges of face-to-face conferences, such as accessibility by those who are disabled, increased carbon footprint, even sexual harassment and assault, and exclusion to presenters who are caring for family members. As the time on task was not enough, the current list identified in the forum can provide a valuable starting point for those involved in event planning.

Clear Lines of Communication

Rich et al. (2020) talk about the benefits of using the digital online medium as a way to mitigate the many challenges that come with securing a physical space for a face-to-face conference involving hundreds, sometimes thousands of people. However, the



authors, who are also conference organizers, recognized the issue of communicating amongst conference organizers over a digital medium. The current conference is face-to-face but the challenge of communication amongst organizers is the same, and given people are often trying to cover vast areas of space compounded with present conference participants, the challenge of effective communication is something that arises whether in the digital-online sphere, or face-to-face physical one.

One might surmise that a conference organized by language teachers for language teachers and learners may be one where the communication is clear, concise, and informative. With every staff member joining the network, an increasingly complex web of communication is spun that can complicate the work and make communication difficult. The challenge is that events require people to make them come to life – on the operation side and participant side. Establishing clear lines of communication between different teams is imperative to success. Whether via electronic lines like Discord or LINE or by using inner earphones, establishing lines of communication that keep your team engaged is important.

Getting Good Input Data

Popovic (2018) edited an extensive volume on lessons organizers can learn from academic conferences, and one of the many lessons is to ensure the right personnel are chosen for the task of handling necessary data input, and eventual output. In this modern age data is priceless. Events like the JALT annual conference require a large tech presence. Having a working database that can collect proposals, transition the information to a vetting system, export final proposals to a program scheduling system, and take all that information into a registration system is important to design and have in working order. Like the challenge of having clear lines of communication, when a piece is added to the data collection process the complexity increases and thus the chance of something going wrong occurs. Ideally, the personnel for managing any database is a small but tight group that know each other and have their own clear lines of communication that integrate well into the larger event planning organization.

Ethics of Blind Vetting

Popovic (2018) highlighted the process of vetting as being a critical area that basically creates the path for success or failure for any academic conference style event. There will be no Platonic discussions over ethics and morals, but to say that if an event consisting of presentations where people submit proposals are being judged for a limited number of

spaces, then having an ethical process to choose final presentations is of the utmost vital importance. This may seem redundant, but a vetting team needs to be well organized with a leader who understands the ethical side of blind vetting because that person will not only set the tone for those who help with vetting, but practically speaking, will do the blinding. Having clear and understandable criteria is vital because if the vetting process is corrupt, everything else will not go well; the whole system is corrupted. All the work setting up a database and trying to get good data goes to waste if the vetting process is unethical or lacks a real ethical framework. It is not hyperbole to say that the success of any conference style event hinges on the vetting process.

Speaker Coordination

Rich et al. (2020) identified communication amongst the event staff as a critical point of address. This extends to the actual people who will be presenting because ultimately, a significant number of participants attend conferences to engage with leaders and experts in their field (Edelheim et al., 2018). Whether main stage plenary speakers or regular presenters, coordinating communication with speakers is important to a successful event. The challenge is balancing the intensity and flow of information. Speakers are generally concerned about their particular session, but they need to know various logistical details like room technology setup, schedule of presentations, format of presentations, etc. All this starts from the immediate call for proposals, where potential event speakers decide whether to submit a proposal. Most people do not favor email after email with minute details about event particulars. Having a central website or communication space like a Discord Server can aid in conveniently communicating a lot of critical information that often needs to be updated and disseminated in a timely fashion. Addressing such details allows for speakers to concentrate on what they are supposed to be attending conferences for, providing expertise in their field.

Optimizing Human Resources

Whether dealing with digital-online conferences (Rich, et al., 2020) or face-to-face events like many of the JALT conferences, optimizing the often many volunteers it takes to execute an academic conference is vital to the success of any event (Popovic, 2018). There is a team of people who create the event and thus experience all the joys and stresses that come with intense situations like conferences, forums, symposiums, etc. Having clear lines of communication ensures people are working smarter, not harder. If data is collected properly, then a lot of time will be saved when speakers need to be



contacted for programming updates. Events large and small need people who are ready to sacrifice a bit, help fellow team members, and are dedicated to bringing the best event to the participants. While some positions function better with a clear manager, having at least a couple of people working together on something allows for a support system to be built into jobs so that people do not get burned out too quickly. Event planners and organizers need to make sure systems are in place that allow people to take breaks and recharge their batteries while on the job. This can be done by creating a break space away from the main conference space - e.g. in a secluded space in the conference venue that is only accessible to conference staff. Team leaders will need to make a rotation schedule and be ready to step in if a volunteer needs an emergency break. Leaders need to know when to lead by example and allow their staff to take a break.

The Future of Conferencing

We have no crystal ball to look into and tell the future, but the past few years have awakened the possibilities for conferencing while supporting more traditional models. Online conferencing seemed unimaginable before the COVID-19 pandemic, but online communication has skyrocketed since then. Of course, there was technology like Skype, WebX, Facetime, and other video conferencing tools, but they were being used mainly for personal communications. Etzion et al. (2021) assert that harnessing these digital communication tools can allow conferences to become more sustainable by lowering their carbon footprint, creating more equitable means of participation, and incorporating a wider variety of ways to engage topics. The authors also agree embracing the seemingly boundless digital divide will carry challenges that must be addressed when deciding to hold an event like an academic conference. We do not want people to just turn on a computer screen and say that they are attending a conference so they can collect points on their yearly evaluation (Etzion et al., 2021). Conference organizers, whether digital or face-to-face, toil and slave over an event in order to provide an engaging experience that will enrich the lives of the participants, and those involved in organizing the event.

Humans are social creatures who long to be around other humans. Our social nature requires us to have events that are face-to-face, and with the various ways humans acquire and transmit information, the in-person conference model will not be going away in the near or far future (Etzion et al., 2021). That said, the future of conferences is online, or in an environment that allows for maximum flexibility for the participants. There will be a blending of the online space as well as the physical space, which is called hybrid.

The challenge with hybrid more so than with purely online conferencing is that hybrid conferences complicate the operation exponentially because two events are happening. There needs to be an accounting for the physical face-to-face setup, while another team needs to administer the online event. Cameras, computers, video conferencing platforms, microphones, online administrators, and internet lines are all needed for a successful hybrid conference to be executed. The human resources needed for such a task are tremendous. This added level of complexity factors into the planning of every stage of an event. The online team needs to be involved in the planning from the vetting stage when data is collected and systems are set up and developed.

Despite the added complexity, the COVID-19 pandemic has made people expect an online component to be involved in a face-to-face event. Organizations that operate primarily in-person events may see demand rise for other online events that allow those who cannot attend big events to participate more conveniently (Etzion et al., 2021). If anything, event websites will have to become more dynamic and interactive so people can access information better and more easily.

Conclusion

Event planning is no easy venture. This much is obvious. Clear lines of communication are necessary for success between the planning team members and the participants. This begins with ethically collecting good data. The optimization of human resources is vital to maintaining strong systems because when the people who work for a conference are burnt out or misused, the trickle effect can cause massive damage. The well of people is not never-ending, and event planners must treat the people who work with them as a finite resource that needs to be nurtured to sustain the effectiveness of any event, including an academic conference like JALT's Annual Autumn International Conference and Education Materials Exhibition.

As far as JALT is concerned, we need to research this area more, as the lifeblood of the organization brings people together at conferences, meetings, and other events. While the online sphere has taken off and people use Zoom and other video conferencing tools to manage business across the organization, make no mistake, JALT is an organization dependent on face-to-face interaction. As such, future conference team leaders should commit more time to study the mechanics and logistics of event planning, understanding the latest trends within the industry, and being involved in the study of leadership concerning event planning.



Bio Data

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