

## **Open Source GIS Conference 2004 and 2<sup>nd</sup> Annual MapServer User Meeting**

**Document Author: Tuan Nguyen, event planner**

This report provides an overall summary of the above mentioned joint-event. It incorporates certain facts, my views, as well as feedback from the questionnaires. Some recommendations are provided as well. It also includes a profit/loss statement. This event was a huge success, so please accept the comments below as the constructive. Finally, grammar is not my strong point!

Our 210 guests have departed, our event has concluded, and only you and the people involved in the planning and operations will know if it all came about exactly as planned. Some twists and turns emerged, but it was really how they were handled - it was whether or not we met the challenges calmly. It was whether or not we correctly prioritized issues. This was a first time event and at the end, it was a bitter sweet feeling. After organizing any event, it is natural to feel an empty void. We dedicated so much time to address as many issues as we can and at the same time, maintained the faith that it is going as planned and as envisioned. This event was a success. Congratulations to the committee.

### **Reflecting**

It was clear that the committee knew the elements that were important to the community and potential registrants. Dave's idea of letting people choose up to 4 workshops was a success. At first, we were going to ask all registrants to pick 6 workshops, but Dave knew that not all registrants would want to go to 6 workshops. Perhaps they might have wanted only 2 or 3. And that was exactly the case. Furthermore, early on, I read in some articles in GeoWorld Magazines commenting on various conferences. A common comment was that many appreciated a good social calendar. I thought we were doing great with the boat cruise, but Jeff took the initiative and not only identified other "meet & greet" opportunities, but also solidified them into the program. That is another example of understanding what was important to our delegates and developing a program FOR them. It was clear from questionnaires that the social agenda was among the most memorable elements of the week. Finally, I believe we had great balance in our committee, including visionaries, people who are detail-oriented, connected, and all wonderful.

From an operational and logistical standpoint, our entire team did a great job – from working with Carleton University to Hotels to Catering. Hotel negotiations were well done. Debbie and Liz did a great job in ensuring that we did not incur any losses. Carleton University provided us with many surprises and limitations as we grew closer to the event, but we were able to identify the issues on time and deliver a successful solutions. Many thanks to Team Venue for that! Shawn did a great job in leading the team in something that came up at the last minute – the installation CD. Mark allocated day-of responsibilities well, ensuring we had enough resources at all times. We just need to remember that the boot disk should stay in the registration area next time!...if there is going to be a boot disk. The touch of the organizational skills from Debbie and Liz was the success factor to the delivery of a registration task. Delegates came, got their kits,

directions, and no major problems occurred. Without such organization, this would have been very chaotic and thus starting the conference off on a really bad foot. We were weak in terms of enforcing the limitations of each workshop. This was discussed in our meeting with the volunteers and the group felt that it was not necessary to ask every individual if they have the right pass or ticket to enter the lab. Based on feedback, we should have been a bit more strict. Perhaps we were also wrong at assigning two per computer. Either way, people piled up in the back of an already hot room, making it even more stuffy. If we had our program and workshop selection out earlier, perhaps we could have remedied some of it by offering popular session twice.

From a communications standpoint, Communityzero.com was a great tool to stay in touch. The moments we stopped using it, things become disorganized, emails-silos started forming, and many were out of touch. Though there are no perfect tools out there, but communityzero allows us to see how knowledge was built through discussions, share the files, leave an open environment for our committee, manage the volunteers, and bug people with reminders! I suggest using a web-based collaboration tool, similar to communityzero, especially if people are not physically close to each other. Furthermore, the more emails that can be reduced, the less likely it is to develop email silos.

From an implementation point of view, we also did well. However, based on my original implementation plan, we were behind schedule on certain tasks. There were three major tasks that were not executed as planned. They were materials and design, contacting speakers, and contacting sponsors.

- (1) For materials and design, it was my first time trying to produce a “corporate identity” (logo/letterhead) for a group or a community. I wanted to obtain everyone’s feedback. This resulted in many back-and-forth discussions around the look of the logo. When JF and David identified that this may end up taking forever, it made me realize that, relative to other issues, this would not affect the experience of our delegates and made the decision to move on with the logo. This ended up delaying our program, our website, etc. During the conference, the logo became a great discussion builder, which may be good or bad.
- (2) Contacting speakers and sponsors was the other area where we were weak. I had recommended a “call for papers” in an email sent in December, but it wasn’t revisited until mid March, when we realized we didn’t contact enough speakers for the program. However, the biggest unexpected event that we should have planned for, was to provide more support for soliciting sponsors and exhibitors. Dave did a great job at planting the seeds well before our committee even formed. But usually, for a first-time (or first-few-years) event, sponsorship is almost a full-time job, until the events starts turning into a brand and people start to recognize it. We were hoping that committee members could contribute, but that is difficult since everyone else had their own tasks, and we all know that closing any deal requires much leg work – callbacks, emails, reminders, etc. That is why usually, you have one person or a team dedicated to exhibitors and sponsors. There will always be surprises with any event – it’s almost natural! It was really important to address these obvious issues early so we can deal with natural surprises as the

event neared. But instead, we were caught with dealing with an obvious issue (finding speakers/sponsors) in addition to surprises. This made it very difficult and stressful for some. The federal government year-end probably contributed to people's busy schedules. Therefore, it is important to incorporate this or any time constraint into the implementation so that the committee chair can plan resources to accommodate the shortage of time to commit to the event.

- (3) In relation to the lack of sponsors, the exhibition was not as successful as the rest of the conference. First of all, because of the previous point, we did not have enough exhibitors. Secondly, very few people dropped by. I pointed out in an email as well as in our discussions on communityzero, that potentially, few people will attend the exhibits. I identified that if workshops were full, taking up 180 delegates, and then seminars were half full, taking up 60 delegates, then assuming 250 delegates attended the event, no one would be around to look at the exhibits. This is exactly what happened. We did not provide value to the exhibitors. Even though the reception was successful, it did not make up for two days of no traffic. Atlas spent \$2,000 for an exhibit that could have been better spent elsewhere. They set up and sat at their booth all day with no visitors. Furthermore, the exhibition hall was far from the coffee break and lunch was rushed, making it very difficult for people to visit the booths. This area needs the largest improvement – Sponsorship/Exhibitors/ Speakers. Coffee break proximity

Further discussing sponsorship, there were some obstacles against us. The sponsorship scandal made the word “sponsorship” a taboo word. Budgets were getting cut. Directors (Jeff Labonte) was on leave. Open Source GIS is just hitting mainstream. It wasn't easy. If sponsorship/exhibition was deemed very important, then we should have put more time to overcome the inherent obstacles. I felt the sponsorship agreement with Tydac was very good. We received \$5,000 and Tydac received a list of benefits that was very effective at getting their name out. From the website, which had many hits post-conference to the tent cards on top of the computers, to the privilege of allowing their folders to be the official folder of the conference. Although they did not make much use of their booth, it could have been effective if it was used. We had some Bronze sponsors and it was probably the sponsorship level with the highest margin. Our costs were minimal and we received \$3,000. The only problem is that, the biggest value to the bronze sponsor, was the exhibit booth...which we did not deliver on. An opportunity that could not be capitalized was the opportunity of having Zend as a sponsor. They were interested “early” in our sponsorship drive, but we did not have any speakers or any of the program set in place. JF, who had many possible leads, also could not proceed because he needed a more solidified program that we had at that time. Therefore, it is important for us to not only look at the benefits of a sponsor/exhibitor. We also have to provide them with that program detail, enough for them to make that decision. From a partnership perspective, Jeff secured a deal with World of Maps which I felt was great. Every where people looked, they saw the bag and knew that it was the conference bag. This is an example of how we can help a local business but at the same time, get our job done with little cost. Based on feedback, our delegates liked the fact that there was no sales pressure. It was the camaraderie. Thus I feel that the next list of benefits to sponsorship should really be a balance of providing visibility to sponsors/exhibitors and having sponsors support a structure for collaboration.

We can take it a step back and strategically define prospect organizations, then the sponsorship benefits can be more targeted and thus making the conference, from business to technical, much more consistent with the its goals. We had two media sponsors which, based on our feedback form, did deliver us a few more registrants, added to the credibility of our event, and helped us create an identity for the conference. In summary, we have to commit and start earlier next time.

Regarding actual tasks, actions, etc. I distributed an excel document early in December. It contained all the actions and certain dependencies. It was obvious that no one really looked at it until we went through it in the meeting. This is quite common, but still should not have happened. In event planning, it is important to first establish the overall goal of the event, then break them down into tasks, and then identify as many actions/issues as possible and their interdependencies. Then we have to plan our resources and see how we can address the actions. I failed to identify the issue March 31<sup>st</sup> year-end as a large constraint to the resource of time. As mentioned early, that resulted in a few headaches that I knew we could have overcome – and we did a great job at it. Much of the work led up to March 31<sup>st</sup> thus making it difficult to achieve all the work. As the conference neared, naturally, we all started to look at the details...naturally. That document started to be a bit more valuable and then we used it to start the wiki-type document on communityzero so that we can track our daily activities. More details, more details, more details. This is where judgment comes into play. There are two (sometimes three) pivotal points in event planning, where details are revisited; 30 days before and 15 days before, and sometimes 7 days before, depending on how “last-minute” the event is organized. Sometimes, the pivotal points have some relations with contractual agreements with suppliers. At all points, the committee should review the tasks, and add and/or take away what is not as crucial anymore. And to determine that requires using the event goals as a litmus test as well as judgment. At the 30 day mark, we see 65%-85% of what is required to get the event off the ground successfully. For example, we wanted some banners for the conference, we had many options...and we had a budget. In December, this was a potential big issue for our marketing dollars, but then as the event neared, we realized that it is not worth the cost of time and money. Our main goal was to increase on the awareness of open source technologies and allow an opportunity to network. So we kept the banners simple and cost-effective. As another example, we decided to format and produce the entire program on our own, as opposed to getting it laid out by David and printed on quality paper. At the beginning, Fred, JF, and I sat down and looked at various program style and stocks that can be used for the program. But at the end, we kept it simple because at that point, we had to prioritize our deliverables. At the 15<sup>th</sup> day mark, and sometimes at the 1 week mark, many last minute things happen, and certain dependant items are cleared. People cancel or a shower of people register. Or finally, we got our labs booked, and now we can think about setting up directions or putting the lab rooms on the program and then they can be printed. Setting this milestone date helps us to assess even further, where to focus our time and where we should sacrifice. Many costs are associated with last minute changes or surprises. Applying judgment and developing a set of criteria is important. This is why from the beginning, we need keep it as flexible as possible. Before the 30 day mark, though sometimes difficult, it is important to avoid getting into the final details. Because when we are too focused on

detail too early, we lose the direction of the event. So unless it is a conference for thousands of people, try to focus on the big picture up to this 30-day point.

The venue, Carleton University, threw many surprises at us, such as the bureaucratic processes to get information, requests approved, etc. Though many surprises increased our costs, but in other areas, they were cheaper than others. Overall, the venue was well-received, but for one main reason. The weather was not that bad. There were some scattered showers and a small humidity wave in day 1. However, the skies were blue making the campus fairly pleasant. Had it rained all week forcing delegates to use the tunnels, I do not think the venue would have been a good choice. So from the perspective of convenience, if the next event is on a university campus, then it is important to ensure that everything is close to each other, or the sun will have to shine during the conference. Also, technical restrictions affected the effectiveness of open source in general. As Daniel said, “they are telling a bunch of open source hackers that they have no access to do anything.” That really didn’t help the situation. The installation alternative worked brilliantly (thanks again to our CD team), however, perhaps another venue could have made things easier. The benefits of universities is that they have all the computers there already and connected. This is important because the workshops were once again, a fairly hot item of the conference – meaning another venue may mean renting computers for the conference. It can be pricy. The exhibit hall, though only used during the reception, was pretty dirty. I would have liked a cleaner place. However, our delegates had no problems with the room. So it was really a small detail. Finally, food and catering, I felt was very good. The service was great, they were on time, and delivered what they promised. I was at Carleton every day, at 6:00am – even after the night of the boat cruise. They were there at 6:00am, and Brian, the team lead was going through the plans on how to deliver good service. So would I return to Carleton? Only under certain conditions:

- We can get all our rooms close to each other, from exhibition hall to labs
- Better access to network without the charge
- Cleaner rooms all with air conditioning that woks.
- Less bureaucracy
- Etc..

Maybe I am being too demanding, but always worth negotiating. Remember, it’s about taking care of the obvious so we can worry about those surprises. It’s a team effort. But in summary, once again, Carleton University was great this year. Thanks to Dave for making the initial contact.

### **Feedback from Questionnaires**

All this being said, the top three reasons our event was a success according to our delegates were; (1) The atmosphere – camaraderie, positive attitude, (2) the networking opportunities/social events, and (3) the great learning opportunities, workshop and seminar contents. And the most common criticism was that fact that workshops were overcrowded. The questionnaire was filled by over 50% of our delegates and we obtained average rating of 4.6 out of 5. That’s full proof that the committee did a great job! Over

85% of our delegates were informed about the conference through mailing lists. This should be the focus again next year as well as identifying new channels. As I mentioned, advertisements on GIS newsletters was effective, but not as effective as mailing lists, when it came to bringing in delegates. Therefore, be careful when considering buying ad space for the next event. Unless there are other goals for it, for example, brand awareness or it was a benefit for the sponsors. Ideally, a similar media partnership should be developed.

## **Financial analysis**

It is great that our conference turned out to break even. Our cost estimates were just as budgeted. However, we were not on target according to revenue projections. A P/L statement is appended to this report.

### **(1) Cost:**

These are costs incurred to organize the conference and to attract delegates from around the world. The costs are incurred to ultimately generate funds to at least offset these costs. Other cost may have been incurred, including labour time from various organizations, are deemed as marketing costs or contributed/volunteered time. Furthermore, the percentages below are ones that relate to events where the committee is composed of mainly volunteers, thus keeping the costs low.

The cost of the conference was budgeted to be approximately \$70,000 plus an additional \$10,000 in buffer, totaling \$80,000. Our total costs amounted to \$70,260, or an average cost of \$334.57/delegate.

For a first-time event, the ratio for marketing dollars over total cost is approximately 8%-10%. However, if you include web design and depending on its complexity, the costs can amount to 13%-18% of the budget. In our case, we spent 22% which is a little on the high side. One of the major reasons contributing this was the promotional item. The golf shirts alone used up 12% of 22% budgeted. Perhaps next time, t-shirts could have been a better alternative, or now that the price of memory sticks have gone down, for the same costs, we can get memory sticks instead. Another reason for this high cost is that we estimated 300 people who show up and thus we bought too many. However, we did save on the advertising front through media partnerships. Finally, the website used up 8% of the 22% budgeted. Therefore, it would be much more cost-effective to use the existing website or another website, perhaps UMN's website, as opposed to incurring this expense again.

If the event includes dinner, lunch, it usually account for about 20%-25%. In our case, we spent approximately 22% of our budget, which is right on target. The team did a good job in estimating the right number of delegates as the event neared. It helped Team Food & Beverages with the ordering.

The venue usually takes at most 10%, excluding electrical equipment. We managed to use only 9%. However, I usually like to see the venue take up only 8% of the total

budget. Costs may vary quite a bit depending on the type of event. If it has a heavy focus on technology, then expect it to be anywhere from 8%-15%. In our case, the university had most of the computer equipment and it was just the cost of access that had to be incurred. We used just under 6% of our costs towards meeting electrical requirements.

Administrative expenses only took up about 3%. It includes, programs, rental of credit card machine, name tags, etc. This is within the normal range of 3%-5% for this type of event – meaning, we aim to get what is needed and not the “extra” beautifying materials. For example, going with a simple layout and printing the programs at Staples helped us save quite a bit.

It seemed that our delegates really appreciated the shuttle service, and I think Debbie’s team did a great job at identifying the options and keeping that cost low.

## **(2) Revenue:**

From a revenue perspective, did not do poorly. We just did not do extremely well. We underestimated two things. The amount that we can raise in sponsorship, and the amount of people attending.

Excluding DM Solutions Group’s \$15,000 in sponsorship, we were hoping to raise around \$30,000-\$40,000 in Sponsorship and exhibitors. I still feel that it was feasible. Instead we raised only \$13,500. We expected about 8-10 sponsors and exhibitors, combined, however, we ended up with 3 sponsors and one booth purchase. If we were able to bring in a gold, and both silvers, that would have amounted to \$20,000 in sponsorship. Even if we were able to close on 10 bronze sponsors and no gold or silver, that equates to \$30,000 in corporate partnership funds! The main purpose of being very aggressive at seeking sponsorship is not to make money, but to keep the costs low for our delegates, and providing lots of value of money. The absolute ideal is to raise enough sponsorship so that it would cover all costs. Then fee revenue can be used to either reinvest into next year’s event, given towards a scholarship fund for R&D in Open Source GIS, returned to the delegates in a form of a gift. As I mentioned early, this should be done strategically and early.

We also expected approximately 300 people to attend, and only 210 people attended, including presenters and volunteers who either paid at a discount or did not pay at all. This would normally create an approximate loss of 90 persons x \$334/person totaling \$30,600. But what we did not expect was that over 90% of attendees registered for both the Open Source GIS Conference and MapServer User Meeting - \$360 + tax. This raised the average revenue per delegate to \$310.96/person. This helped us bring in approximately \$65,000 in conference pass fees.

## **Delegates and attendance**

Our delegates enjoyed meeting each other and stated that the biggest benefit was putting

faces to names. Hopefully, next year, many people will return. But if they do, then the thrill of meeting for the first time will not be as intense. The committee should consider this and try to see what people would enjoy that would be new. For example, something completely out of the ordinary – the evening of Fat Tuesday’s was really fun. Other than me singing, we had others who came up, and even had one of our delegates, Bruce from Denver, playing the piano, head-to-head with another the real pianist. I am not sure if this is reflective of GIS, but in telecommunications and hi-tech, rock and music are very popular. That is why we have Hi-Tech Battle of the Bands in Ottawa. We do not have that for the accounting industry! It may be worth investigating into what else can we throw into the profile description of our delegates to help us deliver a better event next time, and to help us deliver something new, but equally exciting the next time. We’ve opened the door for people to meet and now what are we going to next. Invite them in! So we should identify what that could mean in our case. Perhaps more focus on the hands-on experience and a chance to network, more to discuss solutions as opposed to getting to know each other.

The majority of the audience were of a technical background. We introduced the seminars to attract management-type people. I am not sure if we were happy with an 85% of the audience being technical, but if we were, then great. But if we wanted more management-type people, then same changes might have to be made. This decision goes beyond just offering a series of seminars that will help them understand Open Source GIS and MapServer. Management people probably enjoy different things and it is important to identify this in a profile of the typical management delegate. Networking is an obvious, but networking with other managers perhaps. I am not sure and it is up to the committee to decide. But just stressing the point of recognizing the slight or major differences between the two groups and that something must be customized or added to the conference in order to satisfy that them. And resources must be ready to support any decision.

### **Summary of Recommendations:**

Contact speakers early (Call for Papers and Presentations)...so you can create a good initial program to contact potential sponsors/exhibitors

Determine importance of exhibitors/sponsors, set goal, set team

A more analysis on resource available during the entire planning and delivering process - incorporate any time constraint into the implementation so that the committee chair can plan resources to accommodate the shortage of time to commit to the event.

It would be nice if you can re-use some of the work – website

Ensure good control over attendance among labs and a comfortable environment...

A/C if necessary

Use a web-based collaboration tool like [www.communityzero.com](http://www.communityzero.com)

Try to land the media sponsors again and more of them. Advertisements on GIS

newsletters were effective. But when it came to attracting registrants, not as effective as mailing lists. Therefore, be careful when considering buying ad space for the next event.

There are two (sometimes three) pivotal points in event planning, where details are revisited; 30 days before and 15 days before, and sometimes 7 days before, depending on how “last-minute” the event is organized. Many costs are associated with last minute changes or surprises. Applying judgment and developing a set of criteria is important. This is why from the beginning, we need keep it as flexible as possible. Before the 30 day mark, though sometimes difficult, it is important to avoid getting into the final details. Because when we are too focused on detail too early, we lose the direction of the event. So unless it is a conference for thousands of people, try to focus on the big picture up to this 30-day point.

So would I return to Carleton? Only under certain conditions:

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Better access to network without the charge

Cleaner rooms all with air conditioning that works.

Less bureaucracy

etc

It may be worth investigating into what else can we throw into the profile description of our delegates to help us deliver a better event next time, and to help us deliver something new, but equally exciting the next time

Management people probably enjoy different things and it is important to identify this in a profile of the typical management delegate

Take care of the obvious so that you can handle the inevitable surprises

Be careful of the over-sales type feel to the conference

Try to incorporate and carry through with a social element this time

Well-balanced committee

## **Conclusion**

In an event, it is important to nail down the details. Logistically, who is going to be where, who is going to pick who up, what will people eat, what will people learn, etc. However, at the end of the event, delegates remember more higher-leveled things. For example, the fact that they DID learn, and they did have a great time. People who probably say, this was a great conference. If one were to ask why, there would be answers like, “it was well-organized”, “lots of networking opportunity”. This is something that is not very easy to accomplish, because satisfaction cannot be obtained through linear extrapolative deducing. In other words, people are not there is no formula to ensuring satisfaction in a conference. Our delegates were clearly, satisfied. So it starts with that vision and then it starts forming the details to support it. Congratulations again on a very well-run conference. Best of luck on the next one.

## Profit/Loss Statement

### Revenue

Revenue in sponsorship	28,500	
Revenue in Registrants		67,710
Less discounts	(15,779)	
Revenue before bad debts		80,431

### Total Revenue

### Expenses

Logo and Webdesign	( 5,682)	
Conference Banners	( 200)	
Letterhead	( 561)	
Pizza	( 500)	
Maps	( 230)	
Memory Stick	( 80)	
Golf shirts	( 8,596)	
Total Marketing expense		(15,849)
Program	( 380)	
Name tags	( 214)	
Poster stands	( 876)	
Workshop tags and event surveys	( 41)	
Business Card and drink tickets	( 12)	
Cost for Moneris Machine		
Total Administration Expense		
Meal Cards	( 5,443)	
Reception, Breakfast, Breaks	(10,631)	
Total Meals Expense		(16,074)
Electrical Requirements	( 3,835)	
Carleton University	( 6,675)	
Shuttle Bus	( 1,795)	
Band – PA Rental and drinks	( 240)	
Boat Cruise	( 9,268)	
Event Planner	(15,000)	
Bad Debt expense		
Total Misc. Expense		()