

ACADEMY OF MANAGEMENT SPECIALIZED CONFERENCES INITIATIVE

General Considerations for
Organizing an AOM Specialized Conference





AOM Specialized Conferences

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Preliminary Proposal Form for AOM Special Conferences





INTRODUCTION

Thank you for your interest in developing a proposal to organize an Academy of Management Specialized Conference. This document provides a brief overview of the process related to the proposal development, review and selection process. If selected for conference development, additional guidelines will be provided. If you have any questions throughout this process, please feel free to contact the AOM Specialized Conferences Committee at AOMCC@aom.org.

ABOUT THE INITIATIVE

The Academy of Management is the oldest and largest association for management and organization scholars, with nearly 20,000 members from over 120 countries. To complement the AOM's Annual Meeting, which calls together approximately 10,000 attendees each August, the Academy is launching a new specialized conferences initiative, exploring new opportunities for members to meet throughout the year, in smaller gatherings, in locations that are reflective of the geographic dispersion of our international membership. To learn more about this initiative, please refer to page 11.





Call for Proposals AOM Specialized Conference Organizers

In response to appeals from the membership for additional professional development and scholarly exchange opportunities, the Academy of Management has **committed to exploring new meeting possibilities** by experimenting with alternate modes of delivery, and identifying novel approaches for collaboration through smaller, regionally-based special conferences.

The Board of Governors, along with volunteers from across the Academy's divisions, interest groups and other leadership communities, have developed a long-term plan to provide for a **diverse portfolio of conference offerings** that will allow members to connect and engage throughout the year, virtually and face to face, in varied locations that are reflective of the geographic dispersion of our international membership. Several new conference models are envisioned as part of this plan. In addition to these models, we expect new conference ideas that reflect the creative energy of our membership to emerge. The plan for realizing this vision for AOM conference activity is designed to continuously evolve as we experiment with new program structures, delivery modes, content features, and conference designs.

To get started, we imagine **three types of specialized conferences** that could fulfill our mission to connect people and ideas while also advancing our vision to inspire and enable a better world through our scholarship and teaching on management and organizations. Proposed specialized conference models include:

AOM Special Thematic Conferences

AOM Special Thematic Conferences focus on the deep exploration of interesting and relevant themes within and/or across specific management disciplines. These conferences are driven by highly innovative content and opportunities for connecting around thought-provoking topics that stimulate discovery and research.

AOM Professional Development Conferences

AOM Professional Development Conferences are designed to provide members with skills and knowledge for both professional development and career advancement.

AOM Regional Immersion Conferences

AOM Regional Immersion Conferences are held in rich contextual environments, marked by highly innovative, experiential content that fosters deep intellectual discovery and mutual learning.

The Academy of Management's Specialized Conferences Committee is currently inviting brief statements of interest from potential host institutions and local organizing committees for **an AOM Specialized Conference to be held in 2018 or 2019**. With this first call, we seek proposals for conferences that serve at least 350 members and that are located outside of North America (where the Annual Meeting is currently held each August).

The Specialized Conferences Committee will accept brief preliminary proposal forms on a rolling basis throughout the 2016-17 term. The ideas that generate the most interest will advance to a second stage of development. The committee will then collaboratively work with these finalists to more fully develop final proposals.



AOM Specialized Conference Models

AOM Special Thematic Conferences

AOM Special Thematic Conferences (AOM STCs) are programs that focus on the **deep exploration of interesting and relevant themes within and/or across specific management disciplines**. AOM STCs are driven by highly innovative content and opportunities for connecting around thought-provoking topics that stimulate discovery and research.

Special Thematic Conferences are envisioned to feature innovative content that bridges the interests of two or more divisions or interest groups. Members are invited to collaboratively develop and co-create this proposed **new conference model**.

AOM SPECIAL THEMATIC CONFERENCE MODEL

Conference Model At-A-Glance:

- Location: Outside of the U.S.
- Expected Attendance: 350+
- Conference Development Timeline: 18-24 months
- Expected Program Duration: 3-5 Days
- Primary Delivery Mode: Face to Face
- Outputs: AOM Global Proceedings
(other possibilities: Publications/Special Issues, Video Components, Social Communities)

AOM Professional Development Conferences

AOM Professional Development Conferences (AOM PDCs) are designed to provide members with skills and knowledge for both professional development and career advancement. These interactive conferences offer a high quality and high level learning experience that has significant positive impact on the professional growth and advancement of attendees. AOM PDCs offer a mix of creative and innovative elements that provide skills training and advanced learning on topics for continued advancement and immediate application.

Recent AOM Professional Development Conferences

- [Academy of Management Teaching & Learning Conference](#)

AOM PROFESSIONAL DEVELOPMENT CONFERENCE MODEL

Conference Model At-A-Glance:

- Location: Outside of the U.S.
- Expected Attendance: 350+
- Conference Development Timeline: 14-18 months
- Expected Program Duration: Varied, 2-5 Days
- Primary Delivery Mode: Face to Face (Hybrid, Virtual)
- Outputs: Media Components/Archived Resources



AOM Regional Immersion Conferences

AOM Regional Immersion Conferences (AOM RICs) provide an opportunity for the Academy’s global membership to deeply engage and explore local scholarship and regional phenomena in an interactive and intimate setting. These meetings are held in **rich contextual environments, marked by highly innovative, experiential content that fosters deep intellectual discovery and mutual learning.**

At the core of the AOM Regional Immersion Conference model are **experiential learning journeys.** Experiential learning and immersion activities embedded throughout the conference are designed to provide deep engagement opportunities and spark new scholarly discourse and exchange. In addition to experiential attributes, AOM RICs feature scholarly papers, symposia, and interactive workshops and may include a variety of other session types and events that encourage dialogue, stimulate new research and offer unique learning opportunities for members.

The best scholarly papers presented at AOM RICs will be published in the Academy of Management Global Proceedings.

Recent AOM Regional Immersion Conferences

- [Academy of Management Africa Conference](#)

AOM REGIONAL IMMERSION CONFERENCE MODEL

Conference Model At-A-Glance:

- Location: Outside of the U.S.
- Expected Attendance: 350+
- Conference Development Timeline: 24 months
- Expected Program Duration: 4-5 Days
- Primary Delivery Mode: Face to Face
- Outputs: AOM Global Proceedings
(*other possibilities: Publications/Special Issues, Video Components, Social Communities*)

Special Acknowledgement: The Academy of Management acknowledges outstanding contributions from Jim Walsh, Helena Barnard, Phil Mirvis, and Stella Nkomo, whose tireless work developing the AOM Africa Conference provided a unique and transformative model for future AOM Regional Immersion Conferences.



CONFERENCE EVALUATION & SELECTION PROCESS

Conference Host Evaluation & Selection Process

Reporting to the Board of Governors, the **Academy of Management Specialized Conferences Committee (AOM-SCC)** will review and evaluate all new AOM conferences against the *Principles for Specialized AOM Conferences* and the additional defined criteria and guidelines set for the specific conference type. The AOMCC will guide the development of proposals and make recommendations to the Board for selection and event development with consideration for the entire portfolio of current and planned conference activity for the Academy.

The AOM-SCC will use a multi-phased process to select the central concept, site, format, and organizing committee for each new conference. The final proposal development phase will be a collaborative process between the selected host and the AOM-SCC liaison, providing detailed agreements and understandings around roles and responsibilities, conference development timelines, resources, budgets, logistics, etc.

Stage 1: During this phase, **brief statement of interest forms** that reveal the core concept, site, format, institutional capabilities, and organizing committee are submitted for an initial review.

Stage 2: Potential hosts are invited to **develop and submit proposals** to organize an AOM conference. Proposals present specific details about the conference idea and interpretation of the model, confirmation of facilities and other logistics, resources and financial assessment, market analysis, and preliminary conference development plan.

Stage 3: Potential hosts are selected for **collaborative development of the final proposal** to host an AOM conference. Final proposals are reviewed and approved by the AOM Specialized Conferences Committee.

Review Criteria/Evaluation Focus

- **Stage 1:**
 - **PEOPLE/PARTNERS:** Organizational Experience (Meeting Management, Partner Relationships, Access to Sponsor Network, AOM Activity), Team Experience (Meeting Management, AOM Activity, Representation)
 - **PLACE/POSSIBILITIES:** Region (Desirable, Accessible, Unique Offerings), Local (Desirable, Accessible, Unique Offerings), Proposed Venue/Facilities (Desirable, Accessible, Unique Offerings), Geographic Location Relative to Portfolio of Planned Offerings, Baseline Conference Logistics (Venue Capacity, Resources, etc.)
 - **PROGRAM CONCEPT:** Unique Differentiator, Creative Enhancement/Draw for Attendees (Program, Outputs, Other)
- **Stage 2:** Location/Partners/Costs/Logistics/Unique Capabilities/Planning/Possibilities/Risks/Market
- **Stage 3:** Agreements, Financial, Partner/Sponsor Confirmation/References



Strategic Principles for Specialized AOM Conferences

In April 2014, the Small Conference Task Force proposed a set of principles to guide the development of a portfolio of smaller meetings and events for the Academy of Management. All new meeting possibilities will be evaluated with these core principles in mind.

Strategic Principles for Specialized Academy of Management Conferences

- We aspire to generate a **diverse portfolio of meeting possibilities** serving our members' desires for professional development opportunities and deep dialogue around specific topics/themes. Exploration of new AOM small meeting models will consider locations that are reflective of our diverse global membership, alternate modes of delivery, and opportunities to create more visibility for our member research.
- We aim to produce events that are **reflective of a leading scholarly association and consistent with the Academy's mission, vision and values**. Events produced under the AOM brand will be developed and owned by the Academy. Membership **growth**, improved **retention**, and member **satisfaction** are results of producing quality events.
- We seek **innovative and forward-looking content, structure and methods** that honor and leverage the experience, expertise and energy of our globally diverse members. The conference should **not** replicate the features and format of the existing annual meeting.
- We strive to produce **small, intimate opportunities for members to learn, engage and connect**. Where format is face to face, attendance should be in the range of 350-700 (maximum 1,000 attendees). This is not an absolute target, but suggests that we neither seek very small, highly exclusive events or a large scale event. Participation might be somewhat higher than estimated, but not much smaller. Virtual conferences have no upper bound unless interaction is compromised.
- We aim to provide an **open and inclusive** opportunity for colleagues from around the world to gather. Participation will be open to all AOM members, based on space availability (conference registration will be available on a first-come, first-served basis).
- We seek to **avoid scheduling standalone events that conflict with, or provide direct competition with the annual meeting activities in features, format or timing**. Unless held in conjunction with the annual meeting, event dates between July-August and/or submission dates between December-January may be discouraged.
- We recognize and seek **opportunities to collaborate with kindred organizations where viable and mutually beneficial opportunities exist**. Where collaboration is proposed, detailed agreements with expectations and responsibilities for all collaborators will be outlined prior to conference development. In managing its brand and to maintain relationships with many kindred associations, the Academy does not lend its name to, or fund, events that it does not produce.
- We recognize and seek opportunities to **collaborate with the Academy's divisions and interests groups in service to all members** and in a manner that drives benefit to the Academy as an organization, the participating division or interest group, and attendees.



- We aim to develop meetings that are **surplus producing**, inclusive of all direct and indirect resource requirements while also considering affordability and cost effectiveness for members to attend. Diversification of our revenue streams is a core goal of the small conference strategy. Some capacity building efforts may be self-sustaining rather than surplus-producing if proposed and approved as such. Combined, the meetings portfolio will contribute surplus to the Academy.
- We aim to produce **high quality meetings, developed through detailed planning, implementation and evaluation plans**. New meetings will require thorough planning to ensure adequate resourcing, scheduling, scope, risk management, quality, communications, and assessment components.
- We will engage in **active organizational learning**, incorporating our understanding of prior activities and decisions to continuously improve our processes for selecting, producing, and managing all conferences.

Additional AOM Conference Model-Specific Criteria

Proposals for Special AOM Conferences should align with the *Principles for Specialized AOM Conferences*. Additionally, proposals should be developed with considerations for the following model-specific criteria:

- **AOM Special Thematic Conferences:**
 - Focus is on the deep exploration of interesting and relevant themes within and across specific management disciplines.
 - Aims to present highly innovative content and opportunities for connecting around thought-provoking topics that stimulate discovery and new research.
 - Is endorsed by the leadership of one or more Divisions/Interest Groups.
 - Serves at least 350 members.
 - Located outside of the U.S.
- **AOM Professional Development Conferences:**
 - Aims to provide members with skills and knowledge for both professional development and career advancement.
 - Includes timely, relevant topics with broad member appeal (e.g. teaching, research methods)
 - Offers a high quality and high level learning experience that has significant positive impact on the professional growth and advancement of attendees.
 - Offers a mix of creative and innovative elements that provide skills training and advanced learning on topics for continued advancement and immediate application.
 - Serves at least 350 members.
 - Located outside of the U.S.
- **AOM Regional Immersion Conferences:**
 - Aims to provide an opportunity for the Academy's global membership to deeply engage and explore local scholarship and regional phenomena in an interactive and intimate setting.
 - Held in rich contextual environments, marked by highly innovative, experiential content that fosters deep intellectual discovery and mutual learning.
 - Institutional capabilities support experiential learning and immersion activities.
 - Serves at least 350 members.
 - Located outside of the U.S.



CONFERENCE DEVELOPMENT PROCESS

Collaborative Conference Development

All conference development roles and responsibilities will be clearly defined during the final conference proposal development phase. Detailed agreements (event specific) with expectations and responsibilities for the local host, collaborators, sponsors/supporters, vendors will be produced prior to conference development. Where financial and legal liabilities exist, formal contracts will be executed to confirm agreements. All program development participants will sign off on a memorandum of understanding to confirm the roles and responsibilities as defined.

While specific roles and responsibilities are not confirmed until the final phase of proposal development, the following outlines general accountabilities that may be expected from the AOM and any partners participating in the development of an All-Academy conference.

Local Host Responsibilities

Local host institutions and/or designated organizing teams may be responsible for the following:

- **Facilities/Space:** Providing space and resources to support **core conference requirements** (see facilities checklist for F&B, room, speaker support/equipment/audiovisual, transportation, climate control, security, modern high-speed internet capabilities, insurance and other core requirements).
- **Local Area Content:** Developing Content for the Website (Travel/Arrival Information-ground transportation, local public transportation, language, currency, etc., Tourism/Area Attractions, Local Customs, etc.)
- **Marketing/Event Promotion:** Developing Marketing/Communications materials to attract local attendees, identifying audiences and promotional opportunities (local associations, institutional networks, etc.)
- **International Attendee Support:** Facilitation and Management of Visa Letters and Travel Support for Attendees.
- **Vendor Coordination:** Assistance identifying local vendors for printing, staffing, development of conference collateral and supplies, etc.
- **Local Organizing Team:** Identifying local volunteer leadership to participate in the conference development process, including pre-conference planning, on-site support, and post-conference reporting.
- **Staffing/Other Professional Support:** Staffing, or helping to identify local vendors to manage, local information/transportation/airport arrival desk, on-site conference management, registration and logistics, etc. Lead project manager to coordinate all local activities and communications with AOMHQ.
- **Developing the Conference Budget:** Providing cost estimates for all conference expenditures and funding source (direct, in-kind, sponsorship). Anticipate areas of financial or operational risk with potential for impacting performance of the conference.
- **Sponsorship:** Solicitation of sponsors for general conference support, ancillary activities and materials, if applicable.
- **Communication/Reporting:** Maintain ongoing communication with AOM throughout the planning and development process, record and communicate learnings for the advancement of future events.



AOM Organizational Responsibilities

The Academy of Management may be responsible for:

- **Professional Management of Event:** Establishing conference development timelines, reporting structure, financial management, technical oversight, project management, volunteer support/guidance, vendor management, professional logistics support, etc.
- **Contracts & Agreements:** Managing the execution of all contracts & agreements unless otherwise assigned to a local host (e.g. vendors, contractors, host agreements, memorandum of understanding documents.).
- **Marketing/Event Promotion:** Identifying Marketing/Communications opportunities through the Academy's global membership and communities.
- **Financial Management:** Vendor Selection/Payment/Exchange (Registration/Program Development Systems), Collaboratively Developing and Confirming the Conference Budget
- **Registration:** Registration System Management & Support, Pricing Structure, Processing Registration Fees, Vendor Payments, Currency Exchange
- **Website:** Conference Website Development/Technical Support & Management
- **Program:** Submission/Review Management System Development & Support, Volunteer Coordination & Support, Technical Program Development Support
- **Logistics:** Contracts/Agreements with Hotels/Vendors, Facilities/Housing/Supplemental staffing support and needs determination, Conference materials (signage, badges)

Specialized Conference Program Committee Responsibilities

The Specialized Conference Program Committee may be responsible for:

- **Business Rules for Program Development:** Defining session types, submission format, submission rules and guidelines, theme/topic keywords, reviewing rules and guidelines, meeting-specific policies and procedures, and all other business requirements needed to develop systems to support quality program content and outputs.
- **Call for Proposals:** Drafting content for the call for proposals, including all relevant and unique aspects of the program, submission rules/policies, etc.
- **Call for Reviewers:** Drafting content for the call for reviewers, identifying and soliciting reviewer participation to increase opportunities for member involvement and ensure the development of a quality program.
- **Communications/Marketing:** Drafting program-related communications for the conference, disseminating the call for proposals and promotional content for the meeting, as needed.
- **Program Design, Development and Scheduling:** Identifying opportunities for collaboration across submissions, developing sessions, preparing the conference program and proposing the scheduled agenda.
- **Outputs:** Identifying all intended outputs for the meeting, prior to program development.
- **Organizational Learning:** Providing periodic status reports during conference development. Document and provide a final evaluation of the program development learnings after the conference.



BACKGROUND: AOM SPECIALIZED CONFERENCES INITIATIVE

AOM Specialized Conferences Initiative

The Academy of Management's Annual Meeting is the oldest and largest gathering of management and organizations scholars in the world. While the size and scope of this global event provide countless opportunities for learning and engaging, showcasing and gaining exposure to cutting-edge research, building vast professional networks, and more, members continue to express their desires for additional, complementary events held throughout the year that allow for deep dialogue and interactions through smaller, highly-focused gatherings.

In response to these desires, the Board of Governors launched an experimental initiative, calling for innovative conference ideas from the membership, which resulted in the production of the Academy of Management Africa Conference in Johannesburg, South Africa. At the same time, the AOM Teaching & Learning Conference (TLC@AOM) was developed to meet the growing teaching-related needs of members around the globe. The reaction to these highly innovative, impactful events reverberated throughout the Academy, resulting in an exploratory period of research and evaluation that would build the foundation to support a portfolio of smaller, geographically diverse Academy of Management conference offerings in the future.

The AOM Specialized Conferences Initiative is a multi-year experiment that aims to develop a portfolio of smaller, meaningful and sustainable new meeting opportunities that complement our large Annual Meeting. The initiative includes the launch of a new governance structure, the AOM Specialized Conferences Committee, to oversee the operational and policy details involved in implementing this new program and infrastructure enhancements to support the development of these new meeting innovations. Several new conference models that allow members to connect and engage throughout the year, virtually and in varied locations that are reflective of the geographic dispersion of our international membership are envisioned as part of this initiative. To get started, the committee aims to develop new meetings that serve at least 350 members in areas outside of the U.S. (where the Annual Meeting is currently held each August). In addition to these models, we expect new ideas that reflect the creative energy of our membership to emerge. The plan for realizing this vision for AOM conference activity is designed to continuously evolve as we experiment with new program structures, delivery modes, content features, and conference designs.

Special Acknowledgement

The Board is grateful to the various volunteers who contributed to the development of the Specialized Conferences Initiative including those who served on the Small Conferences Task Force, the Teaching & Learning Conference Committee, and the AOM Africa Conference Committee. Further, leadership from the Human Resources Division, Research Methods Division, Management Consulting Division, Diversity & Inclusion Theme Committee, and others, whose valuable feedback and insights helped shape the strategy for innovative and impactful new meeting opportunities. The Specialized Conferences Committee started accepting proposals for new Academy of Management conferences in 2016.