

SAS Global Forum Conference Team Roles and Responsibilities

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Conference Committee and Conference Team

OVERVIEW

SAS Global Forum is the premier event for SAS professionals worldwide, offering unequalled educational and networking opportunities. The SAS Global Forum conference is planned and run by volunteers from the SAS Community who collaborate with SAS Institute to plan all aspects of the conference including content selection and delivery.

This document details the roles and responsibilities of the large number of people who contribute to the success of SAS Global Forum each year, including contributions from

- SAS Global Users Group Executive Board
- SAS Global Forum Conference Chairs
- Content Advisory and Content Delivery Team Leads
- Volunteers from the SAS community
- SAS Institute

Conference Committee

The conference committee is the primary group responsible for the success of SAS Global Forum. The committee members include

- Current Conference Chair and two incoming Conference Chairs
- Chair and Vice Chair of SAS Global Users Group (SGUG) Executive Board (EB)
- SAS employees
 - SAS Global Forum Conference Project Manager
 - SAS Leadership.

This committee meets by phone weekly, and holds at least two face-to-face planning meetings annually.

Conference Team

The conference team includes all members of the conference committee and also includes SAS Community volunteers serving in leadership roles. Specifically,

- Content Advisory Team Leads
- Content Delivery Team Leads.

Additional conference team roles include many members of the SAS Institute Customer Marketing and Event Planning Department. Their roles are detailed in the next section.

The conference team normally meets on a monthly basis in the year leading up to the conference.

Acronyms used in this document

To aid in the readability of this document, the following acronyms will be used throughout.

- SGUG = SAS Global Users Group
- SGUG EB = SAS Global Users Group Executive Board
- EB = SAS Global Users Group Executive Board
- CAT = Content Advisory Team
- CDT = Content Delivery Team

SAS Global Users Group Executive Board Roles in Conference Planning

OVERVIEW

The SGUG is governed by an Executive Board (EB) whose membership is composed of

- individuals who have been selected from the users community to chair the annual conference
- select SAS Institute representatives.

The EB members participate actively in planning the annual conference. The information below focuses on the conference-related roles of the EB Committees. These committees may have other roles and goals that are not included below.

Finance Committee

A committee, approved by SGUG EB, tasked to work on conference related financial business.

- EB Financial Liaison - SGUG EB has created roles for oversight and management of financial issues with SAS Institute, on behalf of the EB and conference
 - The Financial Liaison is the chair of the Finance Committee, and interfaces with SAS Institute on SGUG EB related financial business and with the SAS Global Forum Conference Chair on conference related financial business.
 - The Financial Liaison serves for a two year term beginning at the close of SAS Global Forum of even years and is appointed by the incoming SGUG EB Chair with the approval of the EB.
- The Finance Committee manages two separate budgets
 - SGUG EB
 - SAS Global Forum conference.
- Budget setting and review process
 - The budget cycle is conference to conference.
 - Along with the EB Financial Liaison, the SAS Institute Liaison to SGUG EB is responsible for development and management of the budgets for SAS Global Forum and SGUG EB.
 - The budget is based on historical spend coupled with that year's anticipated spend based on contracts, projected attendance, destination, program, and services changes as directed by SGUG EB
 - The Conference Chair, SGUG EB Chair, and Financial Liaison review and provide feedback on the budget when drafted in the spring for the following conference.
 - Proposed budgets are presented to the EB by the Financial Liaison, Conference Chair, and SAS Institute Liaison at the summer SGUG EB meeting.
 - The SAS Institute Liaison prepares and sends quarterly updates to the Finance Committee highlighting variances to the current budget plan.

Strategic Enhancements Committee

Mission: The mission of the Strategic Enhancements Committee of SGUG EB is to investigate and develop opportunities to improve the SAS User experience at each annual conference; to develop innovative ways to encourage new interactions of SAS Users with the SAS Global Users community; to attract returning SAS Users to the conference who have previously attended a SAS Global Forum; to enhance SAS User interactions with Conference Proceedings, and to develop innovative methods outside the conference to engage SAS Users.

Process: The Strategic Enhancements committee seeks ideas from upcoming conference chairs to focus efforts of the committee and work with those conference chairs to effectively integrate these strategic initiatives into future conferences. The committee conducts periodic brainstorming sessions to develop new ideas that could be implemented by the committee and develops methods to utilize the data gathered from previous conferences and other external data to support the rationale for the idea. Each program will attempt to include methods to collect data to measure success and provide rationale on how the ideas related to the overall mission of SGUG. Ideas for these brainstorming sessions will be solicited from committee members, other board members, SAS users, and SAS Institute staff.

sasCommunity.org Committee

Mission - To provide oversight to sasCommunity.org in order to maintain relevancy and functionality.

This committee will also be known as the *Community Advisory Board*.

Junior Professionals Program Committee

- The committee has ownership of the Junior Professional Program including pre-conference promotion and selection, administration at the conference, and post-conference engagement. This includes refinement of the definition and improvements to the program, selection process, and criteria for selection. The committee works closely with the Leadership Development committee of the EB to ensure that these young professionals remain a viable pool for future volunteers and leaders.
- The committee is responsible for communicating with the conference committee and SAS Institute to make sure each year's program is promoted in a timely manner and that the nominations and selections are done professionally, efficiently, and with an eye toward good customer experience. The committee gathers metrics on each project associated with the program to determine its success.

Liaisons for Involvement and Connection (LINC) Committee

Mission

- To serve the conference committee (including SAS members) by ensuring SGUG EB is effectively supporting conference-specific needs
- To serve SGUG EB by ensuring members are aware of and responding to conference-specific needs/issues
- To serve SAS Institute by ensuring appropriate connections are made between SGUG EB & SAS Institute to resolve issues and to ensure easier communications
- To oversee the implementation of SGUG EB initiatives (not assigned to other EB committees) into SAS Global Forum
- To bridge gaps, minimize conflicts, and improve coordination of SGUG EB involvement in SAS Global Forum
- To improve coordination and communication between the Conference Committee, SGUG EB, and SAS Institute, particularly around the implementation of SGUG EB initiatives into SAS Global Forum
- To serve as SAS' touch-point for SAS Global Forum sponsorship program.

Nominations Committee

Mission: Attract the best candidate to chair the upcoming conference, and participate as a SGUG EB Member.

Activities include the recruiting, evaluation, and nomination of potential candidates. This committee develops the selection process and maintains relevant documents.

User Group Liaison Committee

Mission: The Users Groups Liaison Committee fosters and facilitates communication between and among users groups (regional and local) and SAS by providing a forum to share ideas to ensure a successful user experience for conference attendees. The Liaison Committee will engage in and energetically lead strategic discussions of innovative, leading-edge new ideas to make the events more valuable to attendees. This will include transparent information sharing about best practices and lessons learned from past events as well as enthusiastic investigations of new concepts.

Site Selection Committee

Mission: To consider, vet, and recommend future SAS Global Forum conference sites & venues to SGUG EB for approval. The committee typically works on sites 5-6 years prior to an unbooked year.

Social Engagement Committee

Mission: Create a stronger voice that leverages and shares the depth and variety *of experience and knowledge* of SGUG EB members using Social Channels to bring more awareness of and interest in SAS Global Forum to the Worldwide Community of SAS Users.

Deliverables: Create programs, messages and actions for SGUG EB members that drive a strong user voice/awareness around SASGF

Leadership Development Committee

Mission: Provide additional resources and guidance to the SAS community with a goal of increasing the potential leader pool and improving the leader experience for SAS Global Forum.

CHARTER: The Leadership Development Committee focuses on the following deliverables to increase the potential leader pool and improve the leader experience for SAS Global Forum.

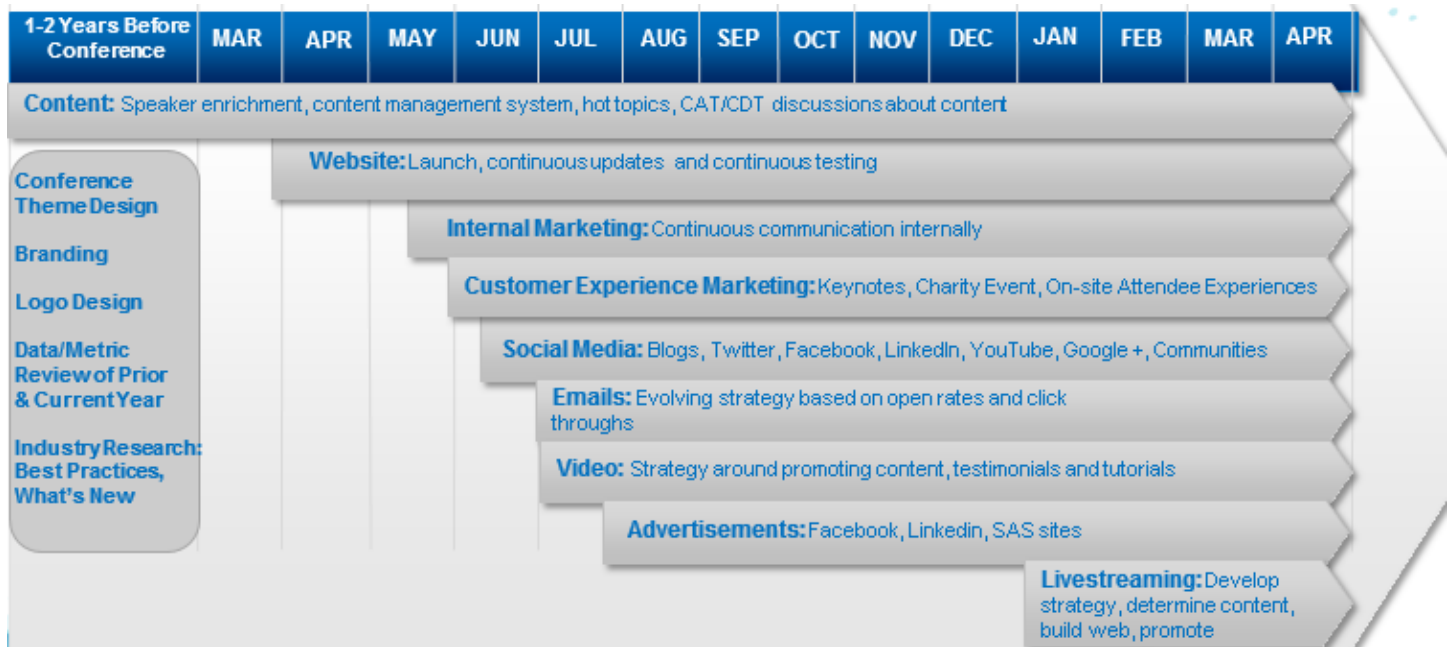
- **Documentation** – clearly document the conference-related roles and responsibilities of the leaders (Conference Chair, Team Leads, SAS Institute Conference Team, and SGUG EB)
- **Leader Efficiency / Clarity / Opportunities for Improvement** – Focus on ways to increase efficiency and clarity for SAS Global Forum leaders that enable focus on innovation and execution versus trying to determine process and rules. This should also clarify roles and Responsibilities.
- **Path to Leadership** – build a clear leadership path to help qualified folks in funnel progress to the leadership level they aspire to.
- **Funnel** – build the bench of potential leaders around the various leadership roles for SAS Global Forum.

SAS Roles in Conference Team

SAS invests a significant amount of resources in SAS Global Forum. SAS works on a minimum of 3 SAS Global Forum events in parallel. The following section provides an overview of key SAS roles that collaborate with SGUG EB, most often via the Conference Committee. The functions listed below all interact with many other experts across SAS to ensure these functions are completed on time, with high quality and as efficiently as possible. The core functions for the SAS team include:

SAS Role	Description
SAS Leadership	<ul style="list-style-type: none"> • SAS Institute Managers of the team members that work on SAS Global Forum on a daily basis. • Interface to executive management at SAS Institute
SAS Global Forum User Conference Project Manager	<ul style="list-style-type: none"> • Project manages the entire SAS team. • Coordinates work effort between the conference team and SAS Institute • Collaborates with the Executive Conference Project Manager and team to ensure both co-located conferences goals are achieved.
SASGF Executive Conference Project Manager	<ul style="list-style-type: none"> • Project manages the entire SAS Institute team focused on the Executive Conference. • Collaborates with the User Conference Project Manager and team to ensure both co-located conferences goals are achieved.
Content Management	<ul style="list-style-type: none"> • Drives, manages and executes Content and Content Delivery Strategy • Liaison to the SAS Institute Editorial Review Board (drives SAS Institute content) • Technology Connection coordination
Marketing and Promotion Plan Execution and Reporting	<ul style="list-style-type: none"> • Promotional Strategy & Execution • Conference Theme development and design • Keynote Research, Recommendations and Coordination • Conference Website
Digital and Social Planning and Implementation	<ul style="list-style-type: none"> • Social Media & Engagement • Mobile App & Gamification • Coordinate social marketing efforts with SGUG EB, SAS users and conference planning teams
Registration Management	<ul style="list-style-type: none"> • Coordinate and manage conference registration systems and processes including <ul style="list-style-type: none"> ○ Conference discounts ○ Pre-conference Tutorials ○ Attendee communications through registration application
Logistics Management	<ul style="list-style-type: none"> • Venue Space Planning Management, Set-ups & Drawings • Coordinates and manages Social Activities, Catering, IT, Security and Shipping • Coordinates Site Inspection and Planning Visits
The Quad	<ul style="list-style-type: none"> • Coordination of Booth Design & Layout with SAS construction team • Works with Individual Departments on Booth Properties and Exhibit Needs • Project manages overall effort of SAS employees who work in The Quad.
Sponsorships and Budget Management	<ul style="list-style-type: none"> • Manages SAS Global Forum Budget for SAS Institute and liaisons with SGUG EB Finance Committee • Coordinates and manages event sponsorships
Additional Resources	<ul style="list-style-type: none"> • Video / Film team - pre-conference and at-conference

This following overview is an example of the marketing cycle built to support and promote SAS Global Forum. Planning starts up to 2 years prior to the conference and continues up to the actual event. A post conference promotion is also completed which focuses on follow up with Attendees and promotion of the content/papers/experiences that occurred at the event. This cycle does change over time as conference planning needs change.



Conference Team Volunteer Roles

OVERVIEW

The SAS Global Forum Conference Team, comprised of volunteers from the SAS community, collaborates with SAS to plan all aspects of the conference including content selection and delivery.

The **Conference Chair** for SAS Global Forum is selected 2-3 years prior to their conference year. This enables the upcoming chair to work with the current conference chair and team for at least 2 conferences prior to their conference year, thus gaining the knowledge and experience they need to lead their conference team.

In addition to the Conference Chair, the Conference Team includes two very important community-based teams

- Content Advisory Team Leads and Members
- Content Delivery Team Leads and Members

The **Content Advisory Team** Leads and Members begin to work 14 to 16 months prior to the conference to research, identify, and proactively attract relevant content that appeals to conference attendees and to the worldwide audience that uses the conference content year-round. Individuals who participate in this role are considered experts in specific content areas including programming, analytics, administration, data management, solutions, or business intelligence and analytics. (See below for details of Content Advisory Team Roles and Responsibilities).

The **Content Delivery Team** Leads and Members begin to work 12 months prior to the conference. Content Delivery Team Leads work closely with SAS staff on content delivery logistics and communicate with the presenters to ensure that presenters and authors have everything they need to provide a high quality presentation and paper. (See below for Content Delivery Team Roles and Responsibilities).

Conference Chair – Roles and Responsibilities

A newly selected conference chair immediately becomes an active member of the Executive Board.

High level roles, responsibilities, and approximate timing are provided as an overview of the scope of the conference chair role. The conference chair actively collaborates with SAS and the EB for conference planning activities.

- 25 - 36 months prior to conference
 - Shadow other conference chairs to understand their areas of focus and to assist as needed
 - Review surveys and other available research to determine possible areas of focus and changes
 - Participate in SGUG EB and Conference Planning meetings
 - Recruit volunteers for the current conference tutorials and manage the delivery of tutorials
- 18 - 24 months prior to conference
 - Shadow other conference chairs to understand their areas of focus and to assist as needed
 - Develop and refine your conference plans including theme, goals, marketing focus
 - Participate in SGUG EB and Conference Planning meetings, including participating in EB Committee meetings
 - Recruit tutorial instructors for the current conference
- 12 - 17 months prior to conference
 - Shadow other conference chairs to understand their areas of focus and to assist as needed
 - Refine conference goals, theme, website, and content focus areas
 - Selection and launch of your conference team
 - Participate in SGUG EB and Conference Planning meetings including conference update presentations to EB
 - Shadow the Conference Chair at the conference 1 year prior to his/her own conference

- 6 - 11 months prior to Conference
 - Work with Conference Team on Content Planning, Attraction, Submission, and Delivery (this will be a substantial effort)
 - Work with SAS and SGUG EB on conference Marketing efforts
 - Work with SAS on your role in the Opening Session and the Technology Connection
 - Participate in the face-to-face conference committee planning meeting

- 0 - 5 months prior to Conference
 - Continue to work with your conference team on the conference content and delivery, and on how the content fits into different marketing efforts
 - Assist your conference team in dealing with
 - speaker cancellations and changes
 - timing issues
 - logistics issues
 - speaker communications
 - volunteers attraction and usage
 - Participate in the face-to-face conference committee planning meeting

- **At conference**
 - Time Commitment: 2 days before opening day plus all 4 conference days
 - Opening Session and Technology Connection practice sessions and presentations
 - Webcast Interviews with SAS staff
 - Sponsors - meet and greet and thank yous

- Month following conference
 - Thank yous to the conference team and all of the volunteers
 - Compile agenda items and participate in the face-to-face post-conference debrief meetings

- Year following conference
 - Write and present a conference recap for the summer SGUG EB meeting
 - Provide mentoring / advice to the upcoming conference as appropriate

Content Advisory Team Leads

How we identify and attract conference content?

Conference content is the primary draw for conference attendees, and thus attracting the right content and presenters is the focal point for planning. Teams of experts proactively guide conference content from the User Community and SAS to identify relevant topics and key presenters that will be valuable to the many personas that make up our audience.

Community Input - What Content and Events to Offer

To better understand what the community wants to learn, and what they value most in conference content and events, online surveys and focus groups have served as the basis for community input for the current and future Conferences. We continue to further assess community input through presentation evaluations, attendance in presentations, and conference survey information from previous conferences to proactively identify, attract, and gain the best content possible for the conference.

Content Experts - What Content to Attract

Experts from the community and from SAS serve as **Content Advisory Team Leads and Members** and use the community input together with their knowledge to proactively plan and refine **conference content and paths** for a wide range of personas. In 2014 and 2015 the conference paths were designed to accommodate the SAS Global Forum audience based on

- Content Area (Programming, Analytics, Administration, Data Management, etc.).
- Level of SAS usage (beginner, intermediate, power-user, manager of users)
- Industry (Banking, Insurance, Health and Life Sciences, Education, Government, Retail, etc.)
- SAS technologies (SAS Software, Products and/or Solutions)
- Role (Statistician, Programmer, Analyst, Manager, etc.)
- Presentation Type (Business, Technical)
- Presentation Format (Poster, Hands-On Workshop, Quick Hit, Panel, Table Talk, Breakout, etc.)

We continue to refine these areas and create new paths as necessary for future conferences.

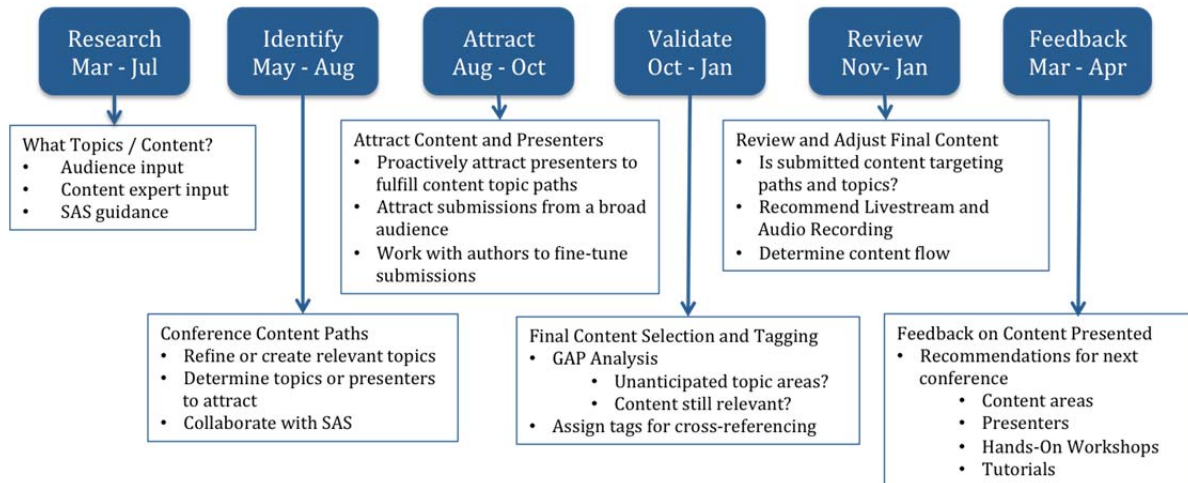


Content Advisory Team - Identify, Attract, Recruit and Validate Content

Content Advisory Team Leads will work closely with Content Advisory Team Members (Content Experts from SAS and from the community) to make the content happen!

Roles and Responsibilities of the Content Advisory Team Leads

Content Advisory Team Leads will work together to identify Content Experts from SAS and the Community to serve as Content Advisory Team Members. Assuming an April Conference, their roles and responsibilities include:



Benefits of serving as a Content Advisory Team Lead

- Increase your knowledge by learning about new SAS technologies, and business and industry trends
- Increase your network of Content Experts including SAS staff, Content Experts, Industry Leaders
- Increased visibility within the SAS Community
- Gain leadership experience

Time commitment for a Content Advisory Team Lead

It is expected that Team Leads will likely spend, *on average*, 5-8 hours a week in research, planning, and coordination, with the busiest months being May, June, October, November and January.

How to apply to be a Content Advisory Team Lead

Application Timing: **15-16 months prior to the conference**

- Complete the Content Advisory Team Lead Application
- Prepare a résumé or CV that summarizes your
 - Education
 - Employment roles and responsibilities
 - Areas of expertise
 - SAS and non-SAS conference attendance and participation related to your career
- Submit the application and your résumé or CV to the conference chair for the year of interest.

Content Delivery Team Leads

Content Delivery – at the Conference and Beyond

Once the content and presenters are identified, there are logistics involved in providing high quality presentations and events. SAS Global Forum content includes both live events and the content that lives on after the conference ends (proceedings papers, Livestream and audio presentations, etc.). The role of the Content Delivery Team is to ensure that presenters and authors have everything they need to provide high quality presentations and papers.

Roles and Responsibilities of the Content Delivery Team Leads

Volunteers from the SAS Community will work closely with SAS throughout the conference planning process, focusing on Content Delivery. Some of the specific Team Lead Roles include:

- Presenter Mentoring Program
- ePoster Coordination
- Hands-On Workshop Coordination
- Volunteer Coordination
- Code Doctors Coordination
- Presenter Coordinators (session flow, lighting, introductions, attendance, etc.)
- Proceedings paper or ePoster preparation and submission
- Communication with Presenters
- And many other details that contribute to a successful conference.

Further details on some of the above roles are provided later in this document.

Benefits of serving as a Content Delivery Team Lead

- Increase your knowledge by learning about new SAS technologies, and business and industry trends
- Increase your visibility within the SAS Community
- Gain leadership experience
- Increase your knowledge of conference planning and execution.

Time commitment for a Content Delivery Team Lead

It is expected that Team Leads will likely spend, ***on average***, 5 hours a week in planning, coordination, and implementation with the busiest months being November - April.

How to apply to be a Content Delivery Team Lead

Application Timing: **15-16 months prior to the conference**

- Complete the Content Delivery Team Lead Application
- Prepare a résumé or CV that summarizes your
 - Education
 - Employment roles and responsibilities
 - SAS and non-SAS conference attendance and participation related to your career
 - Conference planning roles (being specific about how you participated in conference planning and execution).
- Submit the application along with your résumé or CV to the conference chair for the year of interest.

Content Delivery Team Lead Roles

Content Delivery Team Leads usually take responsibility for one or more of the below roles. If staffing permits, an experienced team lead pairs with a less experienced lead to share knowledge on the role and responsibilities.

The below represents the primary responsibilities for each role. More detailed documentation is available on a yearly basis, since the roles are updated and adjusted yearly.

Role Details: Code Doctors Coordination

Overview

Code Doctors is an Expert User-staffed area at the conference, usually in the SAS Quad (formerly known as Demo Area). The Code Doctors are SAS users with substantial experience and expertise in one or more areas related to SAS software, who serve as volunteers, usually for 2-hour shifts, to answer questions posed by attendees.

The Code Doctors area is equipped with 3-5 computers running SAS and with internet access, and connected to a printer, also in the Code Doctors area. The “clients” are SAS users attending the conference with a question or problem about SAS, usually specific to a particular application, who come to the Code Doctors area on a walk-in basis, to get assistance. Code Doctors is typically “open” for some subset of the hours that the Quad is open; this may vary somewhat from year to year, depending on space and scheduling constraints.

In general, the **role of the Code Doctors Coordinator** is to recruit and schedule volunteer **Code Doctors** (see role details in [last section of document](#)), and to provide some minimal level of oversight that the Code Doctors area is running smoothly at the conference. In general, there is a group of long-time SAS users who enjoy being Code Doctors, and this is for the most part a responsible and reliable group. Therefore, recruiting is not too difficult and the coordinator can be pretty confident that the Code Doctors will show up. The biggest challenge is juggling schedules – as many of the Code Doctors will have multiple other conference responsibilities, and the “Open hours for Code Doctors” is not always nailed down early.

Specific Tasks:

Before the conference

- Recruit potential code doctors in sufficient quantity to handle demand.
- Work with SAS and Conference Chair to determine what the Open Hours for Code Doctors will be. Allocate this time into the required number of 1.5 – 2.5 hour shifts.
- Schedule the Code Doctors at times that do not conflict with other duties. Be sure to balance areas of expertise to cover the breadth of questions that will occur. Monitor scheduling regularly to check for conflicts, and COMMUNICATE with the Doctors regarding their schedule.
- Work with SAS to determine what versions of SAS / Enterprise Guide should go on each computer
- Prepare Attendance logs to bring to the conference, to track clients in terms of general topic areas and volume.

At the conference

- Prepare the Code Doctors area set up – equipment, signage, internet, etc
- Confirm attendance log usage, and make sure volunteers are available to help with traffic flow.

After the conference

- 1) Send a note to all your Code Doctors thanking them for their help. This is a small thing, but people do appreciate being appreciated! Consider including some “stats” about attendance at Code Doctors in your message...
- 2) Organize your tracking info so you can pass it on to next year’s Coordinator!!

Role Details: Presenter Mentoring Program

As we continue to expand SAS Global Forum, we maintain a focus on attracting new presenters and providing high-quality content for our attendees. The Mentoring Program is a program developed to assist presenters improve the quality and content of their abstracts, papers, presentations or posters.

Program Goals

- Improve overall conference experience by enhancing the quality of posters, presentations and published papers
- Expand the variety of content and pool of presenters by encouraging new people to share their knowledge, while still maintaining the quality of presentations and content
- Increase interaction between new attendees and frequent attendees / presenters which will improve the overall conference experience for both groups.

Roles and Responsibilities of Mentoring Coordinators

- Identify suggested changes to Mentoring Program for the upcoming conference year including system requirements
- Attraction and recruitment of **Mentors** (see role details in last section of document), spanning a wide range of topics
- Refinements to marketing of the program for potential Mentorees
- Mentor-Mentoree matching and communications
- Monitor progress and engagement of Mentors and Mentorees, and establish checkpoints and metrics
- Communicate key milestones to Mentors and Mentorees with a focus on conference deadlines
- Schedule “Meet and Greet” at the conference
- Prepare a recap of program’s success and suggestions for next year

Role Details: Hands-On Workshop Coordination

The Hands-On-Workshop Coordinators work with SAS, the Conference Team, and the presenters with a goal of successful and effective Hands-On-Workshops at the conference. Key areas of focus include:

- Coordination with Content Advisory Team to confirm that content and session timing is appropriate
- Coordination between SAS and Presenters to confirm software needs including versions, and HOW files that will be used by presenter and attendees
- Communication with presenters to confirm the timeliness and completeness of their workshop files (these are due to SAS well in advance of the conference, so that SAS can test the setup)
- Identification and recruitment of volunteers to serve as HOW helpers (see role details in last section of document) during the conference
- Oversight of HOW room(s) at conference

Role Details: ePoster Coordination

Since ePoster preparation and delivery is very different from usual breakout or HOW presentations, additional guidance is provided to the ePoster presenters. The roles and responsibilities of the ePoster coordinator include

- Review the successes and gaps in the prior conference ePosters and make recommendations for changes. Work with SAS to provide the updated documents for the Speaker Resource Center (Fall)
 - ePoster guidelines including software and format for ePoster
 - ePoster FAQs
 - sample ePosters
- Work with the Communications Coordinator to create standard communications to accepted presenters, as well as triage for questions that come in from presenters (Fall thru conference)
 - Accessing information in Speaker Resource Center (SRC) for guidelines, FAQs, samples
 - Proceedings paper options (pdf of e-Poster will be used in absence of paper)
 - Deadlines for ePoster presenters
 - Meet the Presenters session
- Work with Volunteer Coordinator to create guidelines for ePoster volunteer positions (Winter)
- Create guidelines for reviewing ePoster submissions (Winter)
 - Communications with presenters to fix ePoster issues
 - Communications with ePoster vendor about issues
- Work with SAS for ePoster location guide to be displayed in the ePoster area (Winter)
- Gather feedback from presenters and volunteers to assist in planning future years and update the documentation based on lessons learned (at and following conference)

Role Details: Volunteer Coordination

Two CDT leads work together to plan and coordinate all aspects of the conference volunteer program. The below table summarizes the time-specific roles and responsibilities for volunteer coordination. For details on some of the additional volunteer roles, see the last section of the document.

12-13 months prior	Planning and Preparation: Review prior conference to Identify roles that we still stay the same, identify roles that can be eliminated, identify new volunteer roles that are needed
9-11 months prior	Review and Recommendations Prepare report for Conference Chair to share with SGUG EB regarding participation and effectiveness of volunteer program, along with recommendations for upcoming conference
5-8 months prior	Role Definition, Communication, Marketing, and Recruitment Define roles; update web/marketing information for SAS Conference Marketing Team; create upcoming conference year’s volunteer system and shifts; identify CDT leads responsible for coordinator-based volunteer roles.
1-4 months prior	Volunteer Scheduling and Monitoring Schedule volunteers in roles, communicate with volunteers, etc. and oversee all recruitment needs and gaps. Evaluate volunteer participation and effectiveness.
0-1 month post	Review and Evaluation Gather feedback and share successes and challenges with next year’s conference team.

Role Details: Presenter Resource Team Coordination

Since successful content delivery is a key component of a successful content, one CDT member will focus on coordinating all aspects of the presenter interactions and delivery including

- Presenter deliverables prior to the conference (timing and completeness of bios, paper, ppt, registration, etc)
- Recruitment and management of presenter coordinators (see role details in last section of this document), who will
 - Oversee onsite room coordination (proper setup, attendance, crowd control, intros, etc)
 - Recruit room hosts to assist onsite in presentation rooms
 - Field questions from presenters prior to conference

Role Details: Presenter Communication Coordinator

The role of the Presenter Communications Coordinator is to provide consistent and comprehensive communications to presenters so that all presenters receive the same information. The communications coordinator creates the content for ‘checkpoint’ emails throughout the conference lifecycle including confirmations of content, request for additional information, advisement of missing information, and thank-you notes.

Some of the communications are sent to presenters through the content management system. The more complex emails are sent to the system vendor for uploading and testing. Other communications, developed by the Communications Team, are filtered to the appropriate coordinators from the team for dissemination. For example: Communication of missing tasks, other problems or pending deadlines to presenters (e.g. missing copyright grant or other uploads, paper format problems). The email content is developed by the Communications Team and sent to the Presenter Resource Team Coordinator, who runs reports from the content management system (if the Presenter Coordinators are not given report access) and sends the email and reports to the appropriate Presenter Coordinator for dissemination to the presenters.

The presenter communication coordinator needs to be responsive and tactful since the communications normally deal with time constraints and extenuating circumstances.

Additional Volunteer Roles for SAS Global Forum

Content – Related Roles

Members of the SAS community are encouraged to share their knowledge and expertise by volunteering for one of the following roles

- **Presenters**

- Beginning in the summer prior to the upcoming conference, a “Call for Content” is posted at www.sasglobalforum.com. A variety of presentation formats are welcome; the exact details change yearly but normally include
 - Breakout sessions – normal presentations that are 20 – 50 minutes in length
 - Quick Hits – 10 minute presentations on a very specific topic
 - Hands On Workshops (HOW) - attendees learn about your topic by following along and generating code, or using applications with your guidance. The HOW rooms typically have 60-100 machines with groups of 2 or 3 attendees at each machine. HOW presenters are required to have prior teaching or presentation experience due to the level of guidance and coordination involved.
 - ePoster – attendees can enjoy electronic posters throughout the conference. While the poster can be “static”, it is most effective by enabling a variety of formats including interactive graphics, videos, verbal content, and scrolling content. ePoster presenters also staff their location for an hour during the conference to talk with interested attendees.
- Effort includes
 - submission (title, abstract, bio, working draft) Timing: summer / fall
 - Proceedings Paper and related materials Timing: due a few months prior to conference
 - Presentation (PPT or ePoster) Timing: depends on format but due prior to conference

- **Content reviewers**

- Input from experts in the SAS community helps the Content Advisory Team Leads determine which submissions are accepted for presentation at SAS Global Forum. If you would like to help determine the content, and if you have expertise in one of the content focus areas, we welcome your assistance.
- Timing: Content Reviewers typically review the content in the early Fall.
- Contact the Conference Chair or one of the Content Advisory Team Leads to volunteer.

- **Mentor**

- As we continue to expand SAS Global Forum, we maintain a focus on attracting new presenters and providing high-quality content for our attendees. The Mentoring Program is a program developed to assist presenters to improve the quality and content of their abstracts, papers, presentations or posters.
- If you are an experienced SAS Global Forum presenter and would like to help newer presenters through the submission process or help them take their content from *idea to presentation*, contact a member of the Mentoring Team, or the Conference Chair.
- Timing: Assignments can begin as early as summer (as new presenters think about submissions) and assignments normally continue until conference closing. Mentors usually attend their mentoree's presentation so that feedback and praise can be bestowed on the presenter.

- **Code Doctors**

- Code Doctors is an Expert User-staffed area at the conference, providing technical guidance and assistance to attendees. The Code Doctors are SAS users with substantial experience and expertise in one or more areas related to SAS software, who serve as volunteers, usually for 2-hour shifts, to answer questions posed by attendees.
- Timing: You will be assigned for one or two slots at the conference (normally 2 hours slots)

Logistic – related Roles

- **Presenter Coordinators**
 - This role starts in the late fall, and requires effort from late Fall through the conference. Each presenter coordinator is responsible for the smooth delivery of a group of presentations (usually all presentations assigned to one or two specific rooms). This includes
 - Making sure all requirements are met (registration, paper, presentation, etc)
 - Recruiting volunteers to serve as room hosts for onsite coordination (see details for next role)
 - Scheduling room hosts and providing oversight of all logistics onsite

- **Room Coordinators**
 - Timing: at the conference, normally for a minimum of ½ day
 - 2-3 room hosts are assigned to each presentation room to insure a high-quality presentation experience for the presenter and attendees. Room hosts will be assigned duties, dependent on their experience and choices.
 - Crowd control (entering and exiting presentation room)
 - Attendance
 - Session time keeper
 - Speaker introductions

- **Hands On Workshop (HOW) Helpers**
 - Timing: at the conference, normally for a minimum of ½ day
 - 2-4 HOW Helpers are assigned to each Hands-On-Workshop to assist with Room Host duties (see above) and in addition, to assist attendees with issues related to the hands on workshop, such as
 - Navigation of SAS windows
 - Following technical instructions provided by instructor
 - Coordinating assistance with machine issues.