

Local Arrangements Committee ((Ted Brown and Stephanie Brown Clark)

Final Report of the Local Arrangements Committee 2008 AAHM Meeting, Rochester, New York

The 81st annual meeting of the AAHM was held in Rochester, New York, April 10-13, 2008. A total of 380 people attended (261 early bird regular registrants, 20 non early bird registrants, 76 students, 11 guests, and 12 book vendors/exhibitors). This was the first time in three years that the meeting was held in a U.S. city (which eliminated problems of currency exchange and vendor holdups at the border) and the first time since 1986 that it was held in Rochester. The decision to hold the 81st meeting in Rochester was reached by a unanimous vote of the AAHM officers and Council in spring 2005, shortly after it was learned at the Birmingham meeting that the previously designated host city for 2008 would not, in fact, be available. Stephanie Brown Clark and Ted Brown, both of the University of Rochester, were chosen Local Arrangements Co-Chairs for the Rochester meeting.

Early in the summer of 2005, the Co-Chairs worked closely with AAHM Secretary-Treasurer Todd Savitt and Jill Slater of Helms Briscoe to select a hotel and meeting site. It was determined that the best available hotel was the Hyatt Regency on Main Street in downtown Rochester and that the best available dates were May 15-18, 2008. A conference room rate of \$129 per night was negotiated. A standard contract for all other details was negotiated, and the LAC Co-Chairs were brought into discussions and went on a walk-through with Jill Slater and Hyatt staff before final details were decided. One important decision reached at that early stage was to hold all conference events except the Garrison Lecture and Reception at the hotel rather than to schedule several sessions at the adjacent and walkway-connected Rochester Convention Center. The Co-Chairs believed that holding all events except the Garrison Lecture at the Hyatt would provide a sense of intimacy that was a remembered hallmark of the 1986 Rochester meeting, and they were assured by the Hyatt staff that available space in the hotel could accommodate all the meeting's needs. Another important consideration was the availability of a block of rooms for students and others of lesser means at a nearby, less expensive hotel. These were provided at the negotiated rate of \$89 per night at the Rochester Clarion Hotel, just across the street from the Hyatt. These details were written into contracts by Helms Briscoe, and the final contract documents were reviewed by the LAC Co-Chairs before final scrutiny and signature by Todd Savitt for the AAHM.

During the late summer and early fall of 2005, the Co-Chairs added members to the Local Arrangements Committee. They created a large committee of more than twenty members, who represented a cross-section of the University of Rochester and other local academic institutions and of the local medical history community. Among them were a former Vice President for Health Affairs of the University, a former Senior Associate Dean for Medical Education at the Medical School, and a former Chair of the Department of Surgery. At that stage, one of the LAC's primary goals was to generate donations for the support of the meeting. A total of \$28,300 was raised, approximately half from the University of Rochester, as detailed in the appended budget document. In the course of these fund-raising conversations it was learned that the University President Joel

Seligman strongly wished that the meeting dates be changed to avoid conflict with Commencement Weekend, May 16-18, 2008. With the help of Todd Savitt and Jill Slater, the dates were renegotiated and the contract amended to April 10-13, 2008.

At this point, the LAC began studying and following Blue Book guidelines very closely. Its first major challenge was to secure an appropriate community venue for the Garrison Lecture and Reception. The LAC's unanimous first choice was Rochester's world-famous Eastman House and International Museum of Photography and Film. Our hope was to hold the Garrison Lecture in the 500-seat Dryden Theater and to host the reception in Eastman House, Kodak founder George Eastman's former residence and now an elegant museum with attached galleries and exhibition space. We were told in meetings with Eastman House officials that the facility was *probably* available on Friday, April 11, 2008, but that they were unable to confirm the reservation until spring 2007. We decided to take our chances, and while we waited anxiously for confirmation, we also explored several alternative community venues. Our second favorite option was the Eisenhart Auditorium of the Rochester Museum and Science Center, with the Museum itself as the reception site. As it turned out, our wait for Eastman House confirmation proved worthwhile, and we were able to sign a formal contract in March 2007. We immediately began working closely with Eastman House staff, who proved very helpful in all succeeding stages of the process.

Intensive planning for other details of the meeting likewise began in earnest in spring 2007. Again we followed the Blue Book closely, particular-by-particular. While the Co-Chairs remained involved in all aspects of planning, the LAC also divided into several working subcommittees: for the book exhibit; for program design, ad solicitation and printer selection; for CME credit in conjunction with the Rochester Academy of Medicine; for producing guides to restaurants and other local attractions, etc. We were able to rely on our collective experience as AAHM meeting attendees, book exhibitors, publishers, local medical society members, and administrators, but we also found it invaluable at several points to be able to consult with former LAC chairs on specific details not covered explicitly in the Blue Book or in prior LAC final reports. One of these was how best to communicate about the alternative, cheaper hotel option without putting the Hyatt's contracted per night room guarantees at risk. George Weisz, LAC Chair for the 2007 Montreal meeting, was especially generous and helpful, and in addition to following his advice in other ways we also set all fee levels to match those of the Montreal meeting.

The most challenging period turned out to be December 2007 through January 2008. In those two months, we had to design, lay out, proofread, amend, and proofread again the printed program; design, write, proofread and print the other materials that needed to be mailed with the program to the AAHM membership by late January; design, test, correct, and activate materials for the online registration site by the third week of January; respond to frequent shifts and changes in the program as individuals pulled out or were replaced at the last moment; and work out the initially complicated communication between the BlueSkyz online hotel reservation system and the hotel management. The excellent program produced by Alan Kraut and the Program Committee is described in detail in Alan's thorough report. The particular challenge we on the LAC faced was waiting for the final program as Alan tried to keep last-minute adjustments to a minimum so that he could present us with as final copy as possible. This

was the pressure-producing and rate-determining step, because the actual printing and mailing of the program and the activation of the website all depended on the finalization of the program.

Events moved very quickly and intensely from late January until the start of the meeting in April. Using the Blue Book as our guideline, we worked very closely with the Hyatt staff and particularly with Convention Manager Ryan Marx on all details of catering, space allocation, audio-visual support, hotel accommodations, etc. We were also attentive to the needs of the associated societies, AAHM interest groups and committees, and the like. We had perhaps a half dozen meetings and walk-throughs at the hotel and often twice- or thrice-daily email exchanges and telephone conversations. The Hyatt staff was very professional and a pleasure to work with. They proved flexible and helpful with catering suggestions, inexpensive internet accessibility on the main meeting floor, book exhibit security, complimentary room arrangements, and A-V support. When, in fact, the hotel presented us with an estimate for A-V support (LCD projectors and laptop computers in all sessions plus other A-V as specifically requested) that seemed high, we told the Hyatt that we could get a better price from a respected community vendor, and the Hyatt's price came down to better than the vendor's submitted estimate within a matter of days. It was the Hyatt staff who also suggested that we submit documentation of our tax exempt status, which saved us 8% sales tax on all provided services. Finally, the Hyatt staff brokered what turned out to be a very beneficial relationship with the Rochester Visitors Bureau, which helped by providing all sorts of free materials for our preconference mailings and conference bags and voluntarily staffed a table at the meeting with restaurant and other local information.

The LAC was very impressed with BlueSkyz, the vendor that managed online conference registration and hotel reservations. We found Mike Fink very cooperative, accessible and responsive, and once the system was up and running it seemed to perform flawlessly. We were also very pleased and impressed with Sara Capistrant, the BlueSkyz staff member who handled all registration matters on-site at the meeting. She was extremely competent and very pleasant, and got along beautifully with our many volunteer staff. The same positive assessment cannot be offered about Global Payments, the vendor that was supposed to manage credit card receipts for BlueSkyz and transmit them directly to the LAC by electronic funds transfer. Somehow, Global Payments never got this straight and transferred money to AAHM headquarters in Kansas City rather than to us. This forced Chris Crenner and his staff to send us checks periodically, which in turn led to accounting confusions that may not yet be entirely sorted out.

To shift, though, to a positive note, we would like to underscore the wonderful support we received from two successive Secretary-Treasurers and from so many in the Rochester community. The members of the Local Arrangements Committee all worked extremely hard both in the long months before and in the intensive days during the meeting. At the meeting they were assisted by more than two dozen additional volunteers who stuffed conference bags, helped at the registration desk, changed session signs, and provided warm general hospitality to meeting attendees. The University of Rochester was generous with its financial support and in the very helpful advice various staff provided about conference bag vendors, bus vendors, caterers, etc. The Provost also invested time to prepare his Rochester-specific welcoming remarks at the start of the meeting, and the Department of Psychiatry worked closely with us to schedule the Meyerowitz Lecture as

an adjunct to the meeting following the Opening Reception, using its funds to bring Professor Anne Harrington to Rochester. Several Rochester organizations and institutions contributed financially to the success of the meeting and are listed specifically in the budget. Without their help, we would not have been able to produce the overall meeting profit the budget records.

A final note about the budget and our meeting accounting. The overall balance sheet is clear in general terms, as is our positive if modest bottom line. Some of the details remain fuzzy, however, and at this date we are still trying to reconcile a few of the numbers. We have definitely produced a meeting surplus of at least \$4,824.25, but at this point we still cannot say exactly how large it is. We think our accounting problems derive from two sources: (1) the difficulties with Global Payments and its confusing transfer of credit card receipts; (2) the University of Rochester's internal accounting system. We were required to rely on the latter in order to receive transferred funds from President Joel Seligman, Vice President for Health Affairs Brad Berk, College of Arts, Sciences and Engineering Dean of Faculty Peter Lennie, and Nursing School Dean Patricia Chiverton. Once that University account was established, certain other funds were also transferred into it. But for greater flexibility and simpler accounting, we also established a separate bank account at the Medical Center's Chase Bank branch using the AAHM's \$4,000 "advance" (since repaid in full) to start the account. As a tax exempt organization, we were not required to pay usual bank fees. The majority of our received revenues (registration fees, for example) were deposited in this account, and the majority of our expenses were paid by checks drawn on this account (to the Hyatt, for example). The ledger for this account is simple and transparent, whereas the ledger for the University account is complex, opaque and still not yet fully reconciled.

Recommendations

1. The AAHM should contract with a new vendor to handle credit card receipts and transfers.
2. Future LACs should work with a bank account at a reliable local bank as much as possible and stay as clear as possible from university accounts and accounting systems.
3. The Program Committee should do whatever is necessary to get the final program to the LAC as early as possible, in December if at all doable.
4. The LAC should establish its tax exempt status with the hotel and other vendors as early as possible.
5. The LAC should not hesitate to solicit rival bids for AV, catering, and bus transportation, especially if the hotel's initial A-V estimate is high.
6. The LAC should establish a working relationship with the local visitors' bureau as early as possible.
7. Blue Book guidelines and timetables are extremely helpful and should be regularly consulted but need to be supplemented in certain particulars. The LAC chairs of the most recent meetings should be readily available for consultation on these nitty-gritty items.

Respectfully submitted,
Stephanie Brown Clark and Ted Brown
July, 2008