

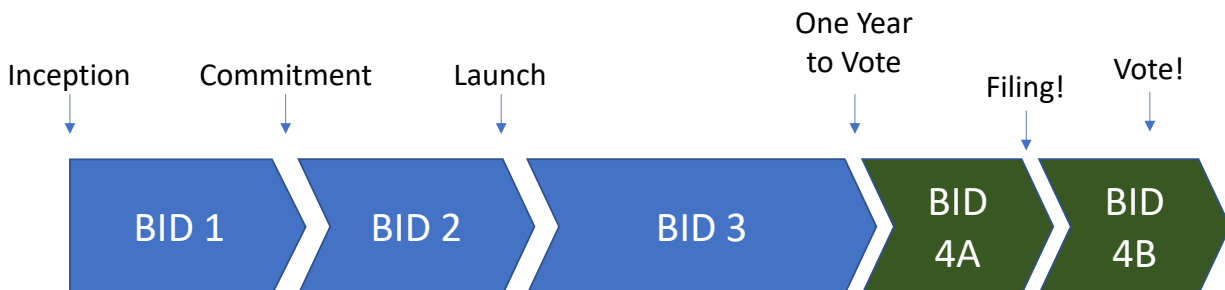
BEYOND THE BID: MAKING A SUCCESS OF TRANSITION

This document sets out tasks that should be undertaken to ensure a successful transition from bid to seated Worldcon. It also suggests questions that can be used to prompt useful discussions with department/area leads.

A smooth transition from bid to seated Worldcon can do much to promote the reputation of both the convention and the committee. A weak or rocky transition leaves a bad impression and puts the convention and team behind in the planning process, perhaps never to fully recover.

Transition activities generally begin in Phase 4 of the bid process and run concurrently with bid activities. There are few “new” bidding tasks during this final year of the process, all having been well established in Phases 1, 2, & 3. Team organization begins to change in this final phase from a bid structure to a more convention-focused structure. This enables the team to hit the ground running as soon as the convention is seated.

We have broken Phase 4 down into two distinct "sub phases", typically lasting ~6 months each; Phase 4A from about 12 months out from the administering convention to the filing date and Phase 4B from filing to the announcement of winning at the Business Meeting.



The plan for “Day 1” should be created working back from the transition date, not forward from where we are now, and needs to incorporate a clear understanding of dependencies. Once this plan is established, the milestones and tasks can be tracked in the normal way via a Timeline process and tools.

As with any generic plan, the information presented here can only be a starting point. Every Bid and every Convention is different and individual tasks may need to be added, deleted, or moved within the schedule. Similarly, not all prompt questions will apply to every Bid. Nevertheless, in our experience the great majority of this material is applicable to most Worldcons.

PHASE 4A Laying the Foundations (~12 months out to Filing)

- Develop provisional organisational structure (list of Divisions/Areas and responsibilities)
- Choose or confirm convention chair
- Choose convention name, theme, catch phrase (if any), and logo
- Begin appointing Division Heads
- Prepare high-level timeline for the convention
- Start GoH selection process
- Onboard people who are not part of the bid team
- Develop draft convention budget
- Establish legal entity, if needed. Note: There may be date and accounting year choices that affect tax and accounting burdens.
- Establish con bank account, card payment facilities etc (often separate from bid accounts)
- Open contract negotiations with necessary venues. Typical approaches have been either a fully executed contract with a conditional-on-winning cancellation clause or a ready-to-sign contract to be executed after the vote
- Obtain letters of agreement or contract for key sleeping room blocks
- Define convention membership categories, rates, planned changes over time and policies (instalment plan, discounts, family plans etc)
- Define overall convention IT strategy and architecture
- Develop convention membership database (may be enhancement of bid database or new solution)
- Develop convention web site and online registration solution
- Begin detailed promotions plan for immediately after the vote through the end of the year
- Determine the convention's merchandise strategy - Will there be a Sales to Members partner(s) and if so, who?
- Prepare & submit filing materials

PHASE 4B – Prepare for the Win (Filing to Award of Convention)

- Complete GoH selection process
- Obtain GoH Bios and supporting material
- Appoint at least interim GoH Liaisons
- Complete facility contract negotiations, if not yet done
- Continue to refine convention Timeline, Budget, etc
- Continue to build convention IT systems
- Plan presence at administering Worldcon (staff, processes, data handling)
- Plan for victory party after the vote
- Promptly inform each GoH of voting results

PREPARE for “DAY 1” (Business Meeting)

- Ensure that the social media team are prepared with channels and material for “Day 1”
- Determine who will represent the con at the Business Meeting (committee, special guests, etc.)
- Prepare PR0 for distribution at the Business Meeting
- Complete and test online registration system
- Ensure that the convention web site is complete, tested, and ready for business
- Confirm membership data format with administering Worldcon

PREPARE to “HIT the GROUND RUNNING” (Immediately Post Administering Worldcon)

- Develop convention written and visual style guides and standard graphics
- Ensure volunteer processes are ready to scale-up quickly after the convention is seated
- Arrange for initial convention marketing material (flyers, ads etc) ready to use from “Day 1”
- Arrange for initial merchandise designs and production needed for “Day 1”
- Prepare to integrate bid supporter and voter data into a convention membership database

CONVERSATION PROMPTS

There follows a prompt and guide for conversations within the bid team and potential convention committee regarding the transition from bid to seated Worldcon. These should be read in conjunction with the bullet lists of activities above (the prompts do not explicitly cover every item in the activity list). Additional commentary is provided in *blue italics*.

Most teams include a mix of more and less experienced people. Some may be new to Worldcon but have deep experience from other conventions, or from outside fandom. Some may be familiar with Worldcon but have not been through the Bid to Con transition before. As we see below, there are more activities and more questions to be considered than one may assume! Hopefully these prompts will enable the team can take a systematic approach and ensure that the transition is well planned and executed.

Common Themes

It is useful to note some of the more common failure modes seen with previous Worldcon transitions.

1. A “day 1” item not being ready because of a lack of forward planning or a failure to understand dependencies. (E.g. not ready to sell memberships online, website content not ready ...)
2. Failure to scale processes and staff ready for the ramp-up of activity that occurs on winning. (E.g. having the Member Services DH answering detailed membership status queries because of insufficient registration staff being in place).
3. Technology not able to handle all the requirements (e.g. Reg system can sell new memberships but can't handle instalment plans or voter conversions). Often due to failure to fully understand requirements and plan the system build in a timely way.
4. Not having a thorough and prepared list of all the items that need to happen immediately on winning. This means not only fannish announcements, signing the site contract etc but things like formal communication to the Guests, the Tourist Board, putting out a press release, etc, etc.

Leadership

- Is our facilitation / support capability ready to transition from Bid to Con? *Do we have sufficient facilitation resources in place, along with DH and other key meeting schedules for at least the first 6 months after the vote?*
- What is the Con called? *Is this the next in a series of Cons in this city, or the first with this location? Will the name only reflect the location or also speak to the vision?*
- Who will be responsible for the visual branding of the Con? *Will there be an explicit Artistic Director – an increasingly common Worldcon role in recent years – and if not, how will we ensure a cohesive approach?*
- How will we visually brand the Con (including design of the Con Logo)? *How will our branding reflect our theme and Vision? If we have an Artist GoH, will we use them, or their work, in our general branding? (See also under GoH below).*
- Do we have all required external contact email addresses identified, created and appropriately staffed/monitored/archived? *This means the “Day 1” addresses only, not all of those that will ultimately be needed.*
- What do we plan for our Site Selection Announcement presentation at the Business Meeting? *Who will be involved? How much preparation/rehearsal do we need? Do we want to include video / video messages e.g. from a civic representative?*

Timeline

- When should we start building our convention Timeline, and how detailed should it be? *Initially one should focus on having maximum clarity on the more immediate activities (e.g. first six months), with an outline of the remainder. Typically, the Timeline also gets more granular towards the Con, e.g. the final version may be monthly for the first 18 months, then weekly for the next 5 months, daily for the last month pre-Con, and hourly for the Con itself.*
- How will we create draft Timeline info for Divisions where no DH is yet in place?

Governance

- Is there a parent organisation (e.g. a local group such as NESFA or LASFS) behind the Bid, and if so, what is the Governance relationship between this organisation and the Bid?
- Is there a formal Constitution / Governance documents which satisfies the WSFS filing requirements? *See <http://www.wsfs.org/wp-content/uploads/2020/08/WSFS-Constitution-as-of-August-1-2020.pdf>, section 4.6. Even if there is a Constitution or Charter in place for the Bid, this may well need to be updated or expanded for the Filing.*
- If there is no pre-existing parent organisation, are the Governance processes sufficiently robust (especially in relation to processes such as replacing the Chair)?

- What is the legal and tax status of the Convention? *This will depend on the proposed location (Country and potentially State). The scale of the event and the volume of money passing through the Convention may necessitate the creation of a specific vehicle – e.g. in the UK it is necessary to incorporate a company. In the US, a 501(c)3 is the usual vehicle.*

Any legal vehicle, such as a company or registered charity, created for Worldcon, will be subject to the relevant local laws (for instance in the UK, Company Directors have specific responsibilities). The relationship between this structure and the WSFS Governance requirements needs to be clearly established and must avoid any potential conflict of interest.

Guests

- How will we generate our initial “long list” of candidates? *To what degree will this be a public exercise? (It can often be good PR to allow bid supporters, or even members of fandom generally, to submit suggestions for names).*
- How will we reduce the “long list” to an initial “short list”? *If we have potentially 100s of names suggested, we need to reduce this down to manageable length for more detailed discussion within the team.*
- How will we get from “short list” to “proposed slate” of people to approach? *Typically this may need an in-person, in-depth BidCom discussion.*
- What will our “offer terms” be to our Guests? *Need to decide level of financial support, room type, support for dependents, how long we would want the Guests to attend for, travel class ... all of this needs to be clear in an offer and then formalised in writing on acceptance.*
- Will we have an Artist GoH? *This feeds into visual branding choices. If we have an Artist GoH, their art will certainly be on the Souvenir Book cover. But will we use them for the PR covers? For advertising graphics? For our logo? Cons have made a wide variety of choices as to whether to use their Artist GoH, a separate featured artist, or an in-house artist for these things.*
- Do we want a Toastmaster and if so, who, and what will their remit be? *Toastmaster can offer a way to appreciate a local personality if our GoH slate feels light in that area; in recent times, the Toastmaster / Hugo MC role has also been used to increase diversity (e.g. Karen Lord; Tananarive Due; Afua Richardson; Sheree Renee Thomas and Malka Older; Annalee Newitz and Charlie Jane Anders).*
- When do we need to be approaching Guests? *Need to allow time for realistic delay in candidate responses and to approach alternates if first choices decline.*

People

- How and when will we appoint the Con DHs? *This is an ongoing process but it's helpful to know when you'd like the majority in place, and especially to be aware of any appointments that are potentially time critical i.e. must be in place before the Vote. There's also a dialogue between the Divisions you ideally want and the people who are available (and the roles they want/are suited for). It would be helpful to have a reasonably stable list of Con Divisions by 6 months before the vote.*
- Is the remit of each Division clear? *The exact boundaries of each Division (what areas and activities are in each one) vary over time; it may be helpful to have these remits explicitly documented to avoid gaps and overlaps.*

Finance and Corporate

- When and where should the Con incorporate (if required)? What will be the accounting year end date? *Considerations here depend on the country (and potentially state) hosting the Convention (and on the location of the legal vehicle, if different). One should choose an accounting year end which is easy to work with (e.g. not falling in the middle of the convention!). Other considerations include optimisation of tax position, minimising the number of years where formal accounts are needed, etc.*
- Who will be the Company Directors or equivalent (if required)? *(See also under Governance). If the legal vehicle is a company/corporation, will this be a "thin" Board of key individuals only, or a larger group which e.g. all DHs are asked or encouraged to join?*
- Are our financial procedures sufficiently robust to support auditing? *Again, this will depend on the reporting requirements for the host jurisdiction and the nature of the legal vehicle.*
- How will we keep our Bid and Con accounts separate? *This is important for financial reporting. Final Bid costs invoiced after the vote should still be charged to the Bid; Con costs incurred before the vote may be charged to the Con etc. We will need policy on this. PR1 should include a formal statement of the final Bid Accounts.*
- Will a new Bank Account be opened for the Con? *If so, then timing (potentially needs to be after incorporation if a corporate account) and location (ideally one would want a Bank with a local branch) need to be considered. If opening new accounts, enough time should be allowed to then get the appropriate card payment arrangements in place before the Vote.*
- What is the membership rate strategy? *This is not only about headline rates but how they increase over time, what will be offered for instalment plans, and what concessions will be available (age based? First Worldcon? Etc). All of this needs to be fixed early enough to be implemented on the website / registration system before the vote. Some features (e.g. intention to offer First Worldcon concessions) might be announced during the bid and used as part of our bid promotional campaign.*

- If public funding is being sought (e.g. Tourist Board / CVB / civic grants or subvention), are the application and reporting requirements and timescales well understood? *Such grants may typically provide for some funding to be released up front, but the balance may only be released post-con, on submission of the final financials and attendance numbers. The budget will need to be structured to facilitate this including how we represent passalong, reimbursements etc.*
- Do we anticipate a cash flow problem around the Con? *Worldcons typically only encounter cash flow issues close to the convention, and in locations where some significant income will only be received post-con (e.g. tax refunds, civic grant payments). If the budget includes reimbursements (e.g. for US Worldcons), this will typically provide a sufficient cash flow buffer. If it appears that there might be a problem, the cash flow should be modelled as part of the budgeting work.*
- Who (within the team) will be arranging our event Insurance and when we do need it to be in place?

Venue / Facilities

- When do we want to sign the facilities contract? *Basic options are to sign before the vote, with a conditional clause that lapses the contract if we do not win; or to have a draft agreed which can be signed immediately after the vote.*
- How much flexibility is needed on space? *Depending on the Con location and circumstances, it may be difficult to estimate the size of the event accurately from two years out. What options can be built into the contract for adjusting the space (up or down) as the con approaches? What size of Con can be supported before there is a problem with program space etc? (Is there any risk that the Con might have to cap memberships at some stage?).*
- How has Covid affected likely hotel rates? *Is the market going to be more competitive, or are rates going up as hotels try to recover their losses?*
- What terms and benefits will we get from our accommodation broker if we use one to manage our hotels? *This typically affects Cons which are taking blocks in many hotels and do not want to coordinate blocks and bookings directly. A booking service may be available from the city or local CVB / Tourist Board; or one may be established with a commercial partner. Will the broker provide us with a % commission on the rooms they sell? How much influence will have over the hotel blocks? Do we want to lock down blocks (guarantee space) even at the risk of attrition payments? Or have less blocks, and less exposure, but risk rooms being taken by other events?*
- What hotel rooms do we think we need? *Whether we lock down blocks or not, we need to have a view on the number and mix of rooms (student / B&B / hostel / 3* / 4* / 5*) that we expect to need. We need to be able to discuss our requirements with our accommodation partner so they can negotiate for the right accommodation. And we need to have at least indicative rates and likely room blocks so we can plan with confidence – particularly in relation to onsite rooms.*
- What can we put on the website when we win? *One of the first things potential members will look at is our accommodation information – how many rooms we have, where they are, and in what price range. We need at least indicative information on Day 1, to help people feel confident in joining.*

- When will we produce our first provisional space allocation? *Space allocation informs so much of our planning that there is a good case for having a first look at it before the vote, when we have plenty of time.*

Filing

- What will be included in our filing? *Minimum requirements are stated at <http://www.wsfs.org/wp-content/uploads/2020/08/WSFS-Constitution-as-of-August-1-2020.pdf>, section 4.6. These comprise the application letter with details of Chair and Committee; Governing Constitution; and Evidence of committed facilities and accommodation. But we can tune this to enhance our “pitch” to the voters, e.g., do we include a civic Invitation letter? Allow sufficient lead time to solicit any special items like this.*
- What documentation will we submit in relation to our space reservation? *To what degree will we show firm holds on multiple hotel blocks, vs. just holding core blocks e.g. for our HQ hotel, and then showing that the city has plenty of other rooms to choose from?*

Staff Services / Volunteers

- Do we have robust and scaleable process for volunteer management (receiving and tracking offers; vetting volunteers; onboarding people including Wiki access, setting up email accounts, adding to email lists etc etc). *These processes need to be robust enough to handle the large numbers of people who may be volunteering at and soon after the Convention where the site is awarded.*
- How will we keep volunteers (especially those not yet allocated roles) warm and connected? *A common failure point for Cons is to lose focus on lower-level volunteers especially those who may not yet have been allocated to a Division. Ensuring that all volunteers receive regular contact (e.g. monthly update newsletters) will avoid people drifting away.*

Member Services

- (With IT) What registration software will we use for the con? *Will it be the same as the Bid s/w, or a different solution? If a different solution, when will it be switched over?*
- (With IT) If we decide to use an existing non-commercial registration solution (e.g. Kansa or Wellington), how will we transition the s/w (particularly if it is under ongoing development) and what support will be available? *There is a trade-off if the intention is to use a solution which has also been chosen by the Administering Con or the one immediately before us. Taking a copy of the existing software earlier enables us to start work on our own version, but may mean we miss out on enhancements being developed by the other Cons. Will any existing developers be joining our team? If not, how will our own IT staff get up to speed on how the application works? How good is the documentation?*
- (With IT) Will our registration system support all requirements from day 1? *This includes supporting new membership sales; upgrades; voter conversions; group discounts (e.g. for families – if we*

decide to have that option); instalment plans; transfers; address changes; gift memberships (buying a membership for someone else); “add-ons” if we have any (items that can be purchased alongside a membership). It is notable how many Cons fail to cover all of these scenarios until months after they are seated.

- How will we merge the voter and supporter data at the Administering Worldcon? *This is an IMPORTANT topic! What will our process be when the Con desk opens after the result is announced? When can we expect to receive the voter data from the Administering Worldcon? Will we try to merge the voter and supporter data so we can easily confirm people’s status at the desk? Or will we work from two lists, manually checking both?*

If we want to have people converting electronically from minute 1, how will this work? If we haven’t imported the voter and supporter data (including sales made at the Bid Desk 24 hours earlier) into the reg solution, how will it know what conversion fee to charge someone? Or will it work on a trust basis? If trust, how will we then validate that everyone paid the right amount? Or will we work outside the system to start with, and then check the data as we move all the memberships into the system in the following days?

Unopposed Bids may receive more support from the Administering Worldcon to prepare for transferring the voter data. Can we agree the transfer format well ahead of time, and get sample data sets so that we can work out and test the data import strategy?

How will we deal with data matching (e.g. same name in Bid and Vote databases, different address – is that two people, or one who moved after joining the Bid perhaps years earlier?).

- Are our registration team and processes robust and ready to operate at scale? *The volume of member queries (re bid status, conversion options, address corrections etc) will rise rapidly in the months after the Vote. Are we building capacity ready to handle this?*
- What Access information do we need to have available for day 1? *People with access needs can often need early reassurance that they are being thought of. What access info do we need to have ready (e.g. venue accessibility info, details on our intention for mobility devices, large format pubs, reserved seating in programme spaces ...)*
- What Childcare information do we need to have available for day 1? *Fans with young family may be looking for at least basic information before deciding to join e.g. will there be a creche/childcare service provided through the Con?*
- Will our FAQs and our virtual Info Desk be manned and ready for day 1? *Expanding the FAQs on the website, and having staff prepared to deal with queries, will be good for our team and for members.*

IT

- Do we have a clear picture of our Con software architecture including all the components and when they need be ready by? *We do not need to know what solution will be chosen for each component, but we do need to know what the components are and who will be responsible for them!*
- Do we have a full set of communication and collaboration tools in place to support the staff? *This includes Email addresses, email discussion lists, real-time chat e.g. Discord, Video/Audio e.g. Zoom/Google Meet, document storage/Wiki, planning/timeline, budgeting, ...*
- Do we have a clear plan to ensure our membership solution is ready for Day 1? *This includes designing, building and testing it with all required functionality. See member services above, but this includes migrating the Bid / Voter information to the solution, selling all types of membership and upgrade, and support for users to maintain their own data where appropriate e.g. update their address.*
- Do we have enough software development expertise to carry out any needed development work in a timely fashion? *Worldcons typically find it hard to source good developers as volunteers; there are many IT people in fandom but most don't want to carry their work life over into their hobby!*

Promotions / Publications

- Who will be responsible for preparing PR0? *Will PR0 be led by the incoming Pubs team or the Bid Promotions team?*
- Do we have a robust plan for the Bid Table at the Administering Worldcon? *Location, size (given potential volume of people who may want to sign up to a popular Bid), staffing ...*
- Do we have a robust plan for the Con Table at the Administering Worldcon? *Location, size (given potential volume of people who may want to check their status and/or Convert), staffing ... the host Con often allows the winning Bid to take over the Site Selection area for the Con Desk to facilitate the numbers who will want to sign up.*
- What Parties will we be running at the Administering Worldcon? *Not only the Bid Parties but the victory party after the result is announced.*
- Will our Press team be ready for Day 1? *The victory Press Release is the first substantial Press activity most teams will have done. The Con will need a basic Media Kit and Press Policy on the website; a Press contact email address (staffed to respond to queries); a distribution list and method (e.g. Mailchimp) for sending the Release out; and a draft of the Release ready to go. The Worldcon Press distribution list is passed from Con to Con but we will need to add our own local contacts to this – the local Tourist Board will usually be able to help with this.*
- What Con branded promotional material do we need on Day 1? *What adverts do we need to have ready to go; flyers and other material; con desk packs; etc.*

- How will we communicate with our Supporters when we win? *It's courtesy and good practice to communicate with our supporters when we have won, letting them know about our name, Guests etc – and about their membership status and how to upgrade. One option is to have PR0 double as the initial promotional flyer AND something that can be mailed out physically to supporters. (This is one time when physical mailing may be worthwhile, in terms of the volume of conversions we may get as a result).*

Merchandise

- What merchandise do we want available at the Administering Worldcon? *Are we just selling off remaining Bid stock, or will we have Con merchandise for sale, and/or Con garments for our staff to wear? What is the sourcing strategy for the Administering Worldcon (particularly if it's in a different country or continent to our own Convention)? Will we use our intended long term supplier, or make a short term arrangement with a local supplier, planning to switch to the long term solution later on?*

Website

- Where does the Website report? *This needs explicit consideration; over the years it has variously been in Promotions, Member Services, IT, and a direct report to the Chair.*
- What content do we need on our Con website on launch day? *This is a surprisingly common failure point for many Worldcons, even uncontested ones. There is no reason to have any “coming soon” placeholders on day 1, given the time available to prepare. Typical material should include full info on registration, plus online registration forms, GoH info and bios, intro to our vision for each Division, FAQs, basic info on access, Con CoC and related policies, and plenty of information about the host city (travel, tourism, things to see and do, eating options, ...). Typical tasks to prepare the website would be as follows, and will need many months of work:*
 - *Establish overall menu structure / navigation tree*
 - *Develop content plan (identify required-by dates and owners for key pages)*
 - *Migrate and where necessary update core content from the bid website (vision, host city facilities, Code of Conduct)*
 - *Develop and test online registration / conversion / upgrade and user self-administration functions*
 - *Develop and test volunteer form*
 - *Develop initial content describing vision for the convention area by area (Programme, Exhibits Events, Hospitality ...) along with key information for Member-facing services (Publications, Member Services, Access, Childcare, Volunteering...) and introduction to Worldcon activities (WSFS, Hugos ...)*

WSFS

- Do we plan to Award Retro Hugos (if applicable)? *This is probably the only material WSFS question we will need to be prepared for on Day 1 (in the case where it's even an option, of course).*

Program, Events, Exhibits, Hospitality

- How will we cover these Divisions (e.g. for drafting their Timeline, answering queries, providing initial info to Website) if their DHs are not yet appointed? *These Divisions typically do not exist during the Bid, and we may or may not have their DHs in place as we move into the year of the Vote.*
- When do we need to choose our Program software solution? *When will Program start to need its software to be in place? Do we need to choose a solution before the vote? If not, do we have a way to capture program enquiries/offers that may start to come in from day 1? Note that Chicon is currently developing a new free version of the code that later became Grenadine (by going back to the original open-source version and enhancing it). This "Planorama" solution will hopefully become a good option for future Worldcons.*
- Will we be hosting the Chesley Awards? *Approaching ASFA during the Bid builds a good relationship and provides clarity for our plans. A good relationship with ASFA in turn will help with bringing in a good range of artists (especially US artists) to the Art Show.*