

**Conference Organizing Committee**  
Conference planning guidelines & lessons learned

I

A. Set-up a “**Standing Conference Committee**”

- a. to keep records of past meetings & conferences (one CD-ROM for each conference)
- b. review successes and failures (and reasons for!)
- c. identify, investigate and propose future conference venues to BOD & Chapter (?) for approval
- d. set a time table for confirmation and implementation
- e. identify organizer(s) and/or organizing committee for each conference

B. Appointed Organizer(s) work with Standing Conference Committee to establish **Preliminary Conference Project**.

- a. confirm dates and theme
- b. confirm preliminary program (and potential LU credits)
- c. investigate basic costs
- d. investigate potential co-sponsorship with other organizations

I. **Theme:**

- related to particular location
- related to profession (both practical and theoretical)
- of interest to members
- of educational value

II. **Duration / Dates** (take into consideration the following:)

- local and international holidays and for maximum member attendance
- avoidance of conflict with other events
- assurance of availability of local support and facilities

III. **Program** (adapted to local circumstances but to include:)

- registration & welcome
- opening get-together & introduction of participants
- time for Chapter meeting (and board meeting)
- substance (including sponsor presentations)
- closing event/dinner
- (NB: review in detail for potential credits!!)

IV. **Preliminary Cost Analysis**

- rough estimate based on standard spread sheet model

V. **Co-Sponsorship**

- identify if needed or desired

**C. Approval of Preliminary Conference Project at BOD meeting**

*N.B.* Presentation is by Organizer(s) and has been previewed by Standing Conference Committee

**D. Preliminary Implementation by Organizer(s)**

I. Confirmations

- availability of space and reservations (hotels, restaurants, etc.)
- availability of speakers & local support, incl. city councils, professional organizations etc. (letters of intent and invitations!)
- access to areas of central and special interest (conf. theme)

II. Detailed Program Development

- Lectures (where & when)
- Visits (where & when)
- Meals (where & when)
- Sponsor presentations (when, how-long, how many LU's)
- Chapter meeting (when and how long)
- Exhibits (when & where)
- Logistics (transportation time and cost)
- Other events (how many, when & where)

III. Detailed Review of LU Credits

IV. Detailed Preliminary Budget Estimate (based on standard form)

- include as many items as can be identified at this stage
- include support by professional organizers if required
- obtain preliminary quotations from suppliers
- include "low", "medium" and "high" attendance estimate
- include estimate of required registration fee level
- at this stage include 20% contingency factor
- show how much sponsor support money will be required

**E. Project Review for go/no-go by Standing Conference Committee, Chapter Treasurer and LU Credits Coordinator with the conference organizers**

Notes:

## **F. Final Implementation**

- a. Publish conference & venue, set dates for early & late registration and appropriate fees
- b. Confirm in writing acceptance of quotations from services suppliers as applicable
- c. Obtain additional quotation as required
- d. Obtain confirmation from speakers in writing, including CV's and back-up materials
- e. Confirm sponsor participation, presence and contributions
- f. Up-date and revise budget based on accepted quotations and sponsor support (reduce contingency to 10%) and cash-flow
- g. Update final program and publish on the Chapter website
- h. Implement brochure design and printing (brochure, quick-reference card & badges)
- i. List items in welcome package (including participants list and speaker hand-outs)
- j. Obtain quotations for give-aways (if not included above)
- k. Ensure that support assistance will be available (either professional or local student/volunteers)
- l. Take our appropriate insurance for all events
- m. Check transportation routes against anticipated conference attendance (e.g. number of buses and legs to run), average traffic for scheduled times (check routes for construction, etc.), availability of taxis/public transport as needed, walking times (ave./slow)

## **G. Conference Execution**

- a. Check that registration desk will be operational with all materials ready for distribution at given time and place (including participants list)
- b. Check that conference information will be properly displayed and up-dated at conference location
- c. Check that late changes can be properly communicated to all participants
- d. Check that last minute info on transportation (when and where buses leave, etc.) is available to all
- e. Check that all visual & audio aids are being properly handled, in place and operational
- f. Check that invited guests have been notified and confirmed
- g. Identify lost and found procedures
- h. Check that tokens of appreciation are ready when and where required

## **H. Post-Conference**

- a. Send tokens of appreciation not distributed at the conference
- b. Check final invoices for accuracy and payment
- c. Send letters of appreciation not distributed at the conference
- d. Final financial report
- e. Assemble conferences records and issue CD-ROM to standing conference committee

## **I. Appendix**

- a. Detailed financials based on standard forms
- b. Spreadsheet based on timing for all items
- c. Standard badge and computer software for producing them