CONFERENCE PLANNING

Conference Planning checklist

Topic	Issues	Who will handle?	When?	Comments (costs, contact person,	Done

				phone, etc.)	
Set a date	Room availability (large groups, meals, computer labs)				
	Conflicts with other conferences				
Organize a committee	Members?				
	Logistics of communication (meetings, email, phone)				
Reserve rooms and labs	Costs?				
	Scheduling				
	Technology available?				
	Large rooms for general sessions				
	Locations for registration, conference headquarters				
	Areas for breaks				
Program development	General topic/theme				
	Call for presenters		3-6 months ahead of time		
	Organize program				
	Coordinate rooms with anticipated attendance				
	Special AV/computer requirements				
Promotion	Announce meeting dates		As soon as possible		
	Mailings (how many, when, to whom, bulk rate requirements)				
	Mailing lists				
	Web and electronic (email) promotion				

	Brochure (design, duplicate, etc)				
	Identify hotels, B & B's dorms, etc (consider location, cost, quality)				
Housing	Negotiate group rates, other amenities (shuttles, etc.)				
	Reserve blocks (guarantees, cancellation policies, etc.)				
	Registration procedures (directly with facilities or via conference registration?)				
	Maps and travel guidelines				
Transportation	Shuttles to/from airport(s)/ trains stations				
	Shuttles to/from lodging to conference				
Food	How many meals included in conference fee?				
	Breaks (drinks, snacks)				
	List of local restaurants/prices/locations				
	Special dietary allowances				
	Alcohol allowances				
Management tools	Database/spreadsheet software				
Money	Collect dues w/registration?				
	Meal costs				
	Set up university account				
	Procedures (name on checks, where to mail, etc.)				
	Method for paying expenses from account (accounting requirements)				
	Receipts for participants (preprinted, on site)				
Display	Will there be one?				
	Location, schedule,				

	logistics				
	Any sponsored functions?				
Outside support	Local business support				
	University contributions				
Conference Packets	What to include (maps, schedule, local info, writing materials)				
	Preparation (collecting materials, duplication, stuffing)				
	Distribution (how, when)				
Name tags	Size and type				
	How generated				
Equipment Setup & support	What is/can be available for presentations				
	What and when to ask presenters for needs				
	When can presenters try out equipment				
	Support staff (setup, troubleshooting)				
Computers	What is/can be available?				
	Who installs or sets up?				
	Who cleans up afterward?				
Entertainment	Information on restaurants				
	Local sites of interest				
	Conference sponsored activities				
	Scheduled free time				

Budget Planning checklist

Who? / What?	Expenses	Account charged	CRRF or NRE budget?
Conference committee			
Travel	$		
Meeting expenses	$_____		

Conference Coordinator			
Fee/Salary	$_____		
Expenses	$_____		
Marketing			
Brochures	$		
Mailing lists	$		
Postage	$_____		
Advertising	$_____		
Office supplies and Expenses			
Stationary	$_____		
Telephone / Fax	$		
Postage / Shipping	$_____		
Conference Site	$_____		
Sleeping rooms/tax	$_____		
Meeting rooms	$_____		
Parking?	$_____		
Food / Beverage			
Coffee / tea	$_____		
Pastries	$_____		
Soft drinks	$		
Munchies	$		
Gratuities?	$		

Management and Administrative Functions of a conference organizer

*Prepare a conference budget.

* Set the schedule for completing tasks leading to the conference [the above table is a guideline]

* Conduct site visits.

* Negotiate contracts with hotels/meeting facilities.

* Recommend and correspond with speakers.

* Prepare session descriptions.

* Set the flow of the conference and plan the program.

* Recruit and train conference staff [advise students prior to conference what will be expected of them: stuffing envelopes, acting as tour guides, drivers…]

* Manage conference crises [during the conference, there can only be one person that makes the final decisions]

* Authorize onsite expenditures [with the conference committee]

* Develop session and conference evaluations [with the conference committee]

* Ensure bills are paid.

* Organize, schedule, and staff Conference Planning Committee meetings.

* Develop conference notices, brochures, and registration forms.

* Communicate with conference registrants.

* Order conference supplies, materials, and equipment; work with suppliers.

* Prepare name badges, signs, banners, and the program book.

* Order room setups for all workshops/sessions.

* Handle logistics re. Hotels / B&B's.

* Process conference registrations in the office and onsite.

Sample table for participants Arrival and Departures

Site Heads & students	Flight arrival info	Flight departure info	Driving arrival info	Driving departure info	Train arrival info	Train departure info	Dates of participation

Site names & Site people	Flight arrival info	Flight departure info	Driving arrival info	Driving departure info	Train arrival info	Train departure info	Dates of participation

Simone's sanity: rough notes for conference planning that made everything "ok"

Food

-[color coding name tags]→someone must be there to take care of that: who knows who is NRE, site people, CRRF

? What is base count of people and costs? between 30-40 [how to respond to drop or increase]

Budget set and fixed? How to handle it →
Coffee breaks, nutrition break [how many people covered by us as far as food]

Snacks-breakfast-dinner-food @airport… [budgeted for other food costs? All meals 100% covered?]

Awareness of special diet needs: vegetarians…

Snacks: Juices, water, whole grain stuff, tea, vegetables

What can we do? Cost-save money on stuff

Which restaurants cater…
Breakfast at hotel? Then going to restaurant "x".
Clear contract with how much things will cost: booze…
Tickets to whatever meal there is

Past conferences food budget:
5-6→ lunch
12$→dinner
with tax and gratuity in, no booze, no soda

Transportation

Who's flying in when? Must come in around the same time
Site people – researchers - students.
Information on who's coming in, who's picking what up?
Ground transport on their end → km and airport fees, taxi's
Off-pattern people affect everything (difference in their costs)
Mini-vans rented by researchers, driver with mini-van at all times [need to rest, forgotten stuff at hotel]
Scheduled services/times [regular driver to wait for people]
Bus: people can feel trapped→ thus vans alleviate stress
When agenda written: free time for site people and researchers

Triple check everything: arrival times [all flight delays, must have cell phone and reachable by everyone!]
Full information: must know who's meeting them, where…from this hour to this hour, you will be with this person/there…emergency # at all times.
Maps: must know where they are, how long the drive is, hotel address and #
All information must be clearly laid out
Airport info [including time to drive to MTL from Ottawa]

Accommodation

Go to Ste-Hyacinthe, see the rooms, see the manager
80$ per room if sharing, w/out tax
55-60 per room not sharing, w/out tax
*The Gault Estate in St-Hilaire? If there is an overflow [120$ can sleep 10 people, same theme team there?] Too expensive
How many rooms needed? Language, gender, age, can a person share the difference [pay check to CRRF] ?
What's included when lodging paid for? Telephone calls, late night snacks…

Equipment

Power point projector
Easel
Picking up, setting up
Translator: Guy Rouleau
Guy will need help with handing stuff out-sign stuff out with driver's license…
Technical support: in Ottawa and St-Damase→print stuff out last minute, change format, telephone calls-any major changes in agenda/area
Everyone who prepares their presentation should come up with a back-up overhead
Order overhead for Ottawa just in case*

General Info-Communications

Everyone should know ahead of time where? When? Who's paying?
Registration fees for St-Damase
*Individual contact with site people at least 2 times: one following letter, then one within the week of the conference [e-mail]
2 formal confirmations via mail, e-mail…at least 2 weeks/1 week before they arrive
Agenda needs to be fixed and set with no more major changes, including meal times-travel times between airport/hotel ASAP
Researchers must be at the special events, socialize→caring about concerns [especially: Peter, Greg, David]
Confirm everything the week before
Students who come normally chip in and do stuff: delegate responsibility to everyone
Name tags, folders, agenda must be organized beforehand and on hand
Site people folder
St-Damase people folder
Ottawa folder
Receipts for monies received through CRRF

Important things to start off with-To Do

Formal letter to be sent out to Site people
Make it clear to Bill that his staff is needed - people who will be around all the time anyway [students that are around for the time being] or hire new people part-time
Set up and maintain displays at both sites [posters, handouts, taped to walls] person to gab
Registration person in Ottawa
Point-person on all food issues
Point-person on transportation
Point-person on lodging [arrange, check-in]
Point-person take full responsibility of agenda's in St-Damase, Ottawa [gopher faxing, copies…]→patient, fix problems fast, make things go smoothly on presentation front
Point-person on communications: info relayed over and over. All [schedule, headcounts/ear to the ground: feedback-happy or unhappy on what's going on]

1 person who knows everything, full control over the budget, if something goes wrong, I make the decision: respected, listened to: absolutely not to certain things, firm and explain why they can't do this time implications, $$$ implications: is it the best decision: if so, make sure everyone knows: includes time of day, canceling meeting, moving tour time…No right to overrule this person→do not expect to be thanked for any of this: thank students, organizers→→do it"

 Try to make every single site guest feel special.

CRRF collecting all money afterwards
Concordia charges 15% for money deposits into their accounts.
All monies taking in must go through CRRF

Payed to CRRF, invoice David B.-->we get $$$ back.

Option A--Get an advance from Concordia [Bill or Madeleine]

Restaurant/caterers must know delay or someone must pay them? → who will pay them→David?

Accomodations fees—

People like Greg→tea at table

$2000 budget buffer extra