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CONFERENCE PLANNING MANUAL

Conference Purpose

A Conference is a prearranged meeting for the consultation or exchange of information and includes a formal agenda. Staging a conference is a complicated process involving hundreds of workflow details.

Date

Reference www.interfaithcalendar.org to ensure no overlap with religious holidays.

Conference Planning Advisory Committee

Conference Chair

Conference Manager (functional responsibility)

Program Chair (liaison of program content and development)

Exhibit Chair

Treasurer (budget)

Publication Coordinator

Registration Desk Coordinator

Volunteers

Conference committee members should be reimbursed for relevant incurred fees associated with the conference.

Conference Chair

The Conference Chair is responsible for the overall implementation of the Conference which includes:

- initiating and coordinating conference committee meetings
- gathering speaker and sponsor commitments
- chair all meetings

Conference Manager

The Conference Manager plans and executes the pre-registration procedure, coordinates cash flow, is responsible for facilities management, all publications (including evaluations) and exhibits. Other responsibilities include:

- ensure job tasks are appropriately delegated
- coordinate registrations
- confirm Facility Rental Agreements
- confirm accommodations and transportation for speakers
- confirm catering
- determine speakers' A/V and room set-up requirements
- determine tables required and electrical assistance necessary include exhibit hall requirements

The Conference Manager will ensure proper room set-up along with signage and A/V requirements. A walk through of the exhibit hall is mandatory.

Conference Program Coordinator

The Program Coordinator is responsible for session and workshop proposals solicitation, review and selection. The Program Coordinator schedules speaker meetings, records A/V requirements, and makes moderator selections. The Program Coordinator may select to have a sub-committee to aid in making recommendations to accept and refine workshop proposals.

The following considerations are used to determine session selections:

1. What is the value of the workshop?
2. Is a similar session being offered?
3. Does the workshop allow for a well-balance conference with a range of interests?

The Program Coordinator, Conference Manager and Conference Chair will determine the master schedule for the conference. The Program Coordinator will maintain a committee accessible Speaker Tracking and Information Chart.

Conference Registration Desk Coordinator

The registration desk will be located in a secure location to accommodate computers and any money-related activities. The location will also allow for temporary storage of materials, distribution the registration kits and badges. A map of the conference logistics must be readily accessible at all times.

The Registration Desk Coordinator will schedule volunteers to staff the desk throughout the day of the conference.

Conference Exhibit Coordinator

The Exhibits Coordinator and the Conference Manager work together to plan and execute the conference exhibits. This includes:

- supervising the arrangement of tables by venue staff
- checking that all requested electrical hook-ups have been provided and are operating correctly
- arranging for return shipping of materials after the conference
- exhibit security is provided throughout set-up and duration of the conference
- representative name badges
- distribution of exhibitor questionnaires

The Exhibitor's Prospectus is designed, printed and e-mailed to all prospective exhibitors and potentially posted to the conference website. The list is based on exhibitors with a relationship and strong alliance to the Conference Sponsor. A contact name for each business firm solicited is maintained by the Conference Exhibit Coordinator. The package will include reservation forms and checklists.

The Conference Exhibit Coordinator is expected to be on-site for exhibitor set-up through exhibitor tear down. An exhibitor's evaluation will be distributed within one week of the Conference. Responses will be tabulated and a summary provided to the Conference Chair.

Venue Selection

Considerations in determining the Conference venue:

- Is there Internet access? If not, is there at least one room that can be set up as an Internet room at extra cost?
- Are the meeting rooms adequate in size to accommodate session attendance?
- Check for sound bleeding between meeting rooms. Sound insulation is very important. Check venue schedule for adjacent meetings.
- Are the meeting rooms all on one floor or reasonably close to each other? Is the floor plan clear?
- What is the access to the meeting rooms—elevator, stairs, and escalator? Is that access speedy and convenient?
- Are there enough elevators to handle large groups moving between sessions on different floors?
- Is there access for the handicapped?
- What are the accommodations for exhibit tables or booths?
- Does the venue require use of an outside contractor to set up the exhibit space or may the exhibitors set up their own exhibits?
- Does the venue provide furniture (tables or booths, chairs, drapery) or signs for the exhibits?
- What are the security provisions for exhibits?
- Is there a venue parking garage or lot? What are the rates for daily attendees?

Budget Planning and Reporting

The Conference Chair, Conference Manager and Treasurer will oversee the budget throughout the duration of conference planning. This sub-committee will provide regular reporting to the Advisory Committee. Discussion of registration and exhibitors' fees will be done by the Conference Planning Advisory Committee.

Specific types of income and expenses that should be considered in preparing the budget proposal are:

Income:

- attendees' registration fees
- exhibitors' registration fees
- sponsorships

Expenses:

- publications and other printed materials
- venue rental and services including catering and A/V
- speaker transportation

Conference Theme, Branding, and Communications

Development of the Conference logo, website and publications (including evaluation and post-conference communications) consist of an Exhibitor's Prospectus, Final Conference Program, and Conference signage.

Meeting room signs will include the session number, title, and times. Conference sponsorship signage will be coordinated through the Conference Manager.

Conference Evaluation Forms

Conference evaluation forms are essential in assessing attendees' satisfaction with the event and the value gained by participating. The evaluation content, distribution, and tabulation are the overall responsibility of Conference Manager. The preparation of the questionnaire is developed in consultation with the Conference Planning Advisory Committee, as specific insight evaluations will be necessary. The Committee should consider including online survey submission with a subscription to Survey Monkey. Evaluations may also be included in the registration package which is provided to all attendees. Additional evaluations must be made available on-site during the Conference.

An evaluation narrative is to be provided to the Committee within 45 days of the Conference. The narrative must include salient comments, complaints and include a numerical analysis.



Conference Moderators

The guidelines for workshops and seminars will be reviewed with moderators two months before the conference and again on site the day of the conference.

Conference Hoteling

Speakers only. Hotel option should be located in the vicinity of the local airport and conference facility.

Conference Food and Beverage

The Conference Manager will oversee all event food choices in conjunction with the Special Events Coordinator at the conference facility. Lunch will be provided.

Conference Proceedings

Session Detail Requirements:

- Title
- Speaker
- Brief Description (250 words)
- Moderator

Website

The conference website is the most visible source of updated information about the program. The preliminary conference program is posted on the conference website and will include information about registration (including deadlines and the refund policy), program information, members of the conference committee, the general timetable and array of sessions should be set when this information is first posted. The website will be constantly updated and should become more specific as the conference date approaches. The site serves to promote and acknowledge sponsors with links to their corporate websites.

The website provides a link to the online registration form.

Conference Support

General Support and Conference benefits:

- corporate logo
- listing in Conference Program as a sponsor
- banner listing in Conference Registration area
- session workshop
- exhibit booth
- conference publications and materials
- thank you by moderator at the beginning and end of the session

Publications and Communications

Information on the forthcoming conference should be disseminated regionally, and locally. In marketing and promoting a conference, the first goal is to attract enough participants to meet purpose and budget of the program.

What is unique about this conference and why would someone want to attend? Persuading people to attend a well-known conference with built-in credibility is easier than recruiting a less-defined audience to a new program. To determine how best to reach your audience, consider the program's quality, value and variety.

The promotional techniques used to motivate people to respond can consist of news releases to publications and associations, direct mail, advertising, web pages, e-mail, and personal selling. Online and offline promotion of the Conference is critical to its success. In order for the advertising of the event to work, it must be promoted where the target market is looking, listening and watching (print, web, radio and tv).

Consider these top promotional tools:

- News Release (PR Web is a good place to start)
- Industry Publications
- Article Marketing (About, eHow)
- Affiliate Partners
- Send Out Cards
- Industry Event Boards
- Google AdSense
- Radio ADs (680 News)
- Email Marketing (Constant Contact)
- Website

All promotional pieces should include the following:

- Date and location of the event
- Sponsored, Co-Sponsored, Supported by listings
- Refund policy

Consider how to attract receptive participants and produce the event cost effectively.

- Start Marketing - it takes an average of 4 to 10 pieces of communication before attendees commit and purchase
- Maximize Subsidies - sell a recording of the breakouts and main stage presentations to reduce costs or let the speakers sell their books onsite and request a fee
- Drive the Theme Home - make sure prospective attendees are clear about "What's in it for Me"
- Use Technology showcasing Conference Previews - tease prospective attendees with material the conference will offer through webinars, videos, and podcasts
- Use Deadlines - offer early bird discounts and bonus incentives on enrollment, and facilitate the registration on-line

Registration

All registration issues are handled the Conference Manager.

Registration can be accomplished in two major phases: pre-registration which takes place prior to the conference and on-site registration at the conference itself (if desired).

Pre-registration or early bird registration begins a minimum of three months before and ends two weeks before the beginning of the conference with those registrations received during this period receiving a discount.

Consider online Event promotion and registration through Constant Contact (refer to Appendices).

Publications, Advertising and Signs

All publications, advertising and signs are handled by the Conference Manager and Publication Coordinator.

Conference publications are produced in collaboration with the Conference Planning Advisory Committee. All publication deadlines will be established at a Conference Committee Meeting with all members present. The Final Conference Program will include:

- introductory material
- schedule
- venue floor plan
- addition of rooms/locations for session and meetings
- corrections to session content and speakers
- a list of acronyms used in the text, and advertisements
- description of workshops

Audio-Visual & Computer Equipment

All audio-visual negotiations and contracts are handled by the Conference Manager.

Attempt to use the venue A/V in-house provider as they have familiarity with the meeting rooms. Internet lines for online demonstrations may be essential for some speakers and must be pre-arranged. An Audio-Visual/Computer Equipment request form should be included in the mailing to all moderators and speakers.

The Conference Manager with the Program Chair will prepare a complete schedule and room-by-room listing of equipment needs providing the time and assigned meeting room for each session, and projected attendance. This will give the conference planners and the supplier a working document that can be amended as planning progresses. It is important, if possible, to keep equipment permanently set-up during the course of a day to minimize labor and rental costs.

APPENDICES

Site Inspection Checklist

Meeting Date(s) including Day(s)

Date(s) Flexible? ___ Yes ___ No If yes, alternative date(s) _____

VENUE

Name

Address

Phone _____ Fax _____

Sales Contact Name/Title

E-mail address _____

Hotel Website Address

AAA Rating _____

Airport and Distance from Hotel? Transportation?

Rate the following: (1 poor – 5 average – 10 superior)

Lobby Décor	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Lobby Seating/Location	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Lobby Condition/Cleanliness	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Menu Selection/Pricing	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Food Quality	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Restrooms Condition/Cleanliness	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Restrooms Proximity	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Security	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Adequate Fire Safety	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Overall Rating	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__

MEETING ROOMS

Space Available on requested dates

Rate the following: (1 poor – 5 average – 10 superior)

Condition/Cleanliness	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Soundproofing	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Décor	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Lighting	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Heating/Ventilation	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Sound System	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Elevators number/proximity	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Restroom cleanliness	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Restroom proximity	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__
Overall Rating	__1__	__2__	__3__	__4__	__5__	__6__	__7__	__8__	__9__	__10__

FOOD AND BEVERAGE

Approximate Cost for Continental Breakfast \$ _____/person

Full Breakfast \$ _____/person

Lunch \$ _____/person

Dinner \$ _____/person

Coffee \$ _____/person

Service Charge _____% Tax _____%

Guarantees needed by _____ days

Any special packages _____

AUDIO/VISUAL

In-house audio/visual company _____

Slide projector \$ _____ Screens \$ _____

Rate the following: (1 poor – 5 average – 10 superior)

Equipment availability __1__ __2__ __3__ __4__ __5__ __6__ __7__ __8__ __9__ __10

Equipment condition __1__ __2__ __3__ __4__ __5__ __6__ __7__ __8__ __9__ __10

Equipment price __1__ __2__ __3__ __4__ __5__ __6__ __7__ __8__ __9__ __10

Overall Rating __1__ __2__ __3__ __4__ __5__ __6__ __7__ __8__ __9__ __10

SERVICE AND AMENITIES

Business Center __Yes__ __No__ Hours _____

Parking __Yes__ __No__ Cost per day \$ _____

FACILITY POLICIES

Cancellation Penalty by date _____ \$ _____

SPEAKER INFORMATION FORM

Please send this information along with a confirmation letter including other pertinent details to the Conference Manager.

Speaker: _____

Name of Company: _____

How will speaker get to site of meeting from the airport?

What accommodations need to be made for the speaker?

What arrangements need to be made for the speaker's meals on-site?

Date(s) of meeting: _____

Time, and duration of speaker's presentation: _____

Theme or focus of meeting:

Contact Information:

Address: _____

Phone: (Business) _____ (Mobile) _____

E-mail: _____

Event Scheduling Checklist

6 to 12 Months Ahead

- o Decide event purpose
- o Choose a theme
- o Visit site options
- o Appoint an event manager
- o Select committees/chairpersons
- o Chairperson forms subcommittees
- o Get cost estimates (site rental, food, drinks, sound/lights, etc.)
- o Get bids for decorations
- o Get bids for design/printing
- o Get bids for other major items
- o Finance committee drafts initial budget
- o Decide on registration fees and exhibitor costs
- o Create sponsorship amounts/levels
- o Compile mailing list (individuals/businesses)
- o Check proposed date for potential conflicts, finalize date in writing
- o Get written contracts for site
- o Invite/confirm VIPs
- o Begin invitation design
- o Create logo for event
- o Send hold-the-date cards
- o Set marketing/public relations schedule
- o Develop press release and calendar listings

3 to 6 Months

- o Continue monthly committee meetings
- o Write/send requests for funding
- o Mail invitations/registration forms
- o Request logos from corporate sponsors for printing
- o Review invitations, programs, posters, etc.
- o Prepare final copy for invitations, return card, posters
- o Complete mailing lists for invitations
- o Order invitations, posters, tickets, etc.
- o Finalize mailing lists
- o Obtain radio/TV sponsors, public service announcements, promos
- o Set menu with caterer for food and beverages
- o Secure permits and insurance
- o Finalize audio/visual needs
- o Select speaker gifts (if desired)

2 Months Ahead

- o Distribute posters
- o Finalize transportation/hotel accommodations speakers
- o Obtain logos from corporate sponsors for program printing
- o Review needs for signs at registration

- o Hold walk-through of event with responsible committees, chairpersons and responsible site staff members at event site
- o Review/finalize budget, task sheets and tentative timeline

1 Month Ahead

- o Confirm staff for registration, hosting, moderating
- o Complete list of contents for welcome packets
- o Prepare enlarged site plan/room diagram
- o Give estimate of guests expected to caterer/food service
- o Meet with all outside vendors, consultants to coordinate event
- o Review scripts and timeline
- o Confirm transportation schedules: airlines, trains, buses, cars, limos
- o Confirm room/hotel accommodations
- o Prepare transportation and accommodations (include arrival time, flight number, airline, person assigned to meet flight)
- o Confirm special security needed for event
- o Schedule deliveries of special equipment and rentals
- o Confirm setup and tear down times with event site
- o Finalize plans with party decorator
- o Give revised numbers to site staff
- o Meet with chairpersons, key staff to finalize any of the above

1 Week Before

- o Meet with all committees for last-minute details
- o Confirm number attending with site staff
- o Hold training session with volunteers; finalize assignments
- o Secure two or three volunteers to assist with emergencies
- o Finalize registration staff
- o Schedule pickup or delivery of any rented or loaned equipment not provided
- o Double-check arrival time and delivery times with vendors
- o Deliver final scripts/ timelines to all program participants
- o Finalize food, catering, refreshments
- o Confirm number of volunteers
- o Final walk-through with all personnel
- o Schedule rehearsals
- o Schedule volunteer assignments for day of event
- o Establish amount of petty cash needed for tips and emergencies
- o Write checks for payments to be made for the day of the event

Event Day

- o Arrive early
- o Unpack equipment, supplies and make sure nothing is missing
- o Be sure all moderators are in place and have scripts
- o Reconfirm refreshments/meal schedule for volunteers
- o Go over all the final details site staff
- o Check with volunteers to make sure all tasks are covered
- o Setup registration area
- o Check sound/light equipment and staging before rehearsal

After the event

- o Meet with your chair persons to evaluate event
- o Send thank you notes/letters to exhibitors and volunteers
- o Confirm dates for next year with site.
- o Send and summarize evaluations

Additional Resources and Tools

Remember the essentials when building your list:

- Do not harvest email addresses
- Do not send messages without explicit consent
- Do not use excessive promotion
- Do not offer incentives for forwarding to a friend
- Do not forget to include a real physical address

- Do use a real name in the "From" line
- Do use your logo in the upper tier of every email
- Do offer a clear opportunity for subscribers to unsubscribe
- Do include web links to limit the length of the email
- Do engage your audience first with a one-to-one email of introduction

Event Back Office Automation

Constant Contact offers an Event Marketing tool which supports the promotion and registration efforts for event organizers. Event links are built into the main website so that registrants go directly to a registration page. Constant Contact handles all the back office tasks including registration payments. The program is seamless, flawless and easy.

Tracking of registrants is available as soon as the event is published. An event homepage will tie the conference details together for the audience.



Facebook: Face It, You Need It



Facebook Business Pages allow you to interact in a more personal on-going way than through a website or even a blog. With Facebook you can feature your Conference, your speakers and special promotions. Facebook allows you to stay top of mind with your potential attendees and your confirmed registrants.

Why Send Out Cards?

Send Out Cards is a great avenue for Conference organizers to get in front of potential attendees. Greeting cards are a powerful business tool to let your audience know how important they are. By creating a card campaign, users can send the same card to as many people as needed - perfect for announcing the conference - SAVE THE DATE!





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