

1. Conference Identification

Name		
Conference Address		
Telephones		
Fax		
Email		

Executive Committee see item 10.1 for other committees	
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Description of Conference	
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Objectives of Conference	

Planned Sessions
Number of each

Reception	Registration	Lectures	Workshops	General Sessions	Dinners

Other events
[name here]
[number of each]

Key Dates

Planning Start Date
Conference Start Date
Conference End Date

	Comments
	See Section 3

Periodic Check Dates

1	5	9
2	6	10
3	7	11
4	8	12

2. Time Line		Insert month abbreviations [or week numbers] and draw lines to show length of task											
Task name													
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													
23													
24													
25													
26													
27													
28													
29													
30													
31													
32													
33													
34													
35													
36													
37													
38													
39													
40													

You may need to have several copies of this sheet for a major conference where planning is going to take a long time. Initially, you would start with one for months, then one for weeks, and, finally, one for days to countdown! Or, you may have a separate timeline for each sub-committee, as well as one for overall progress.

Try to show tasks in the order that they need doing, although one does not necessarily have to end before another starts - you will have to do more than one thing at a time! Use different colours for priority tasks and key dates.

3. Overall Timing

	First Choice	Second Choice	Third Choice
Preferred <u>Days</u>			
Preferred <u>Dates</u>			
Start Times			
End Times			
<u>Clashes</u> with other events, school holidays?			
Timing <u>Convenience</u> - fits in well with ...?			
Number expected			
Registration Cut-off Date			

4. General Venue Requirements - Essentials

Use numbers, stars, ticks

	Nature	Priorit
Type		
Location		
Size		
Spaces available		
Price		
Image		
Access		
Furniture		
Lighting		
Audiovisual		
Catering		
Indoors/Outdoors		
Disturbances possible		
Accommodation		
IT Facilities		

5. Specific Venue

[Page for each venue - and for each member of selection panel?]

Name		
Address		
Telephones		
Fax		
Email		

People	First name	Surname	Telephone
Manager			
Our Contact			
Caterer			

How do they match our essential needs? Mark 1-5, low to high.
 Selection panel may prefer to mark separately and compare notes later?

What do they offer?	Nature	Priorit
Type		
Location		
Size		
Spaces available		
Price		
Image		
Access		
Furniture		
Lighting		
Audiovisual		
Catering		
Indoors/Outdoors		
Disturbances possible		
Accommodation		
IT Facilities		

Consider drawing sketch maps of location & layout - they should provide them?

6. Initial Budgeting

Income	Details	Amount
Sponsorship		
Registration		
Interest		
Balance from previous conference		
Funding grant		
	Total	
Expenses		
Licences		
Insurance		
Publicity		
Hire of Venue		
Hire of Equipment		
Transport		
Administration		
Taxes		
Fees		
Credit card		
Speakers		
	Total	
Balance		

Will need additional pages for details of some items, eg administration

Other Financial Checks	
Registration collection	
Banking	
Accountant	

7. Legal and Insurance

Amount

Company registration			
Insurance			
Public liability			
Equipment			
Income protection			
Credit card reg'tns			
Liquor licence			
Liquor availability			
Venue regulations			
Local regulations			
WH&S regulations			
Parking & access			
Police notification			
Paying venue			
Deferred payments			
Deposit policy			
Refund policy			

8. Promotion and Advertising

Summary [details separate pages?]

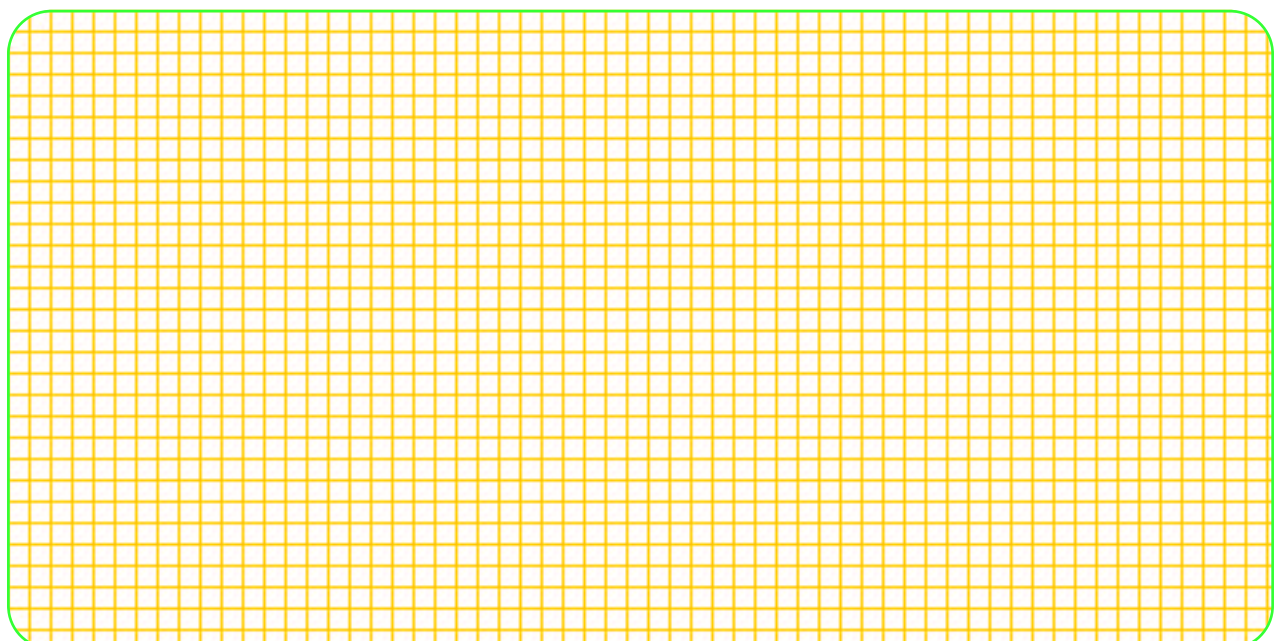
How?			Publicity Officer
Brochures			
Kits			
Interviews			
Mail			
Word of Mouth			
Repeat			
Through venue			
In House			
Bulk mailing rates			
Advertising			Advertising Officer
Newspapers			
Magazines			
TV			
Radio			
Fax			
Internet			
Newsletters			
Media Releases			Media Officer
Advance			
Need for press room			
Interviews at time			
After conference			

10. Staff Requirements		See separate pages for details			
	No.	Areas to be covered	Times		Wages
Registration					
VIP escorts					
Ushers					
MCs					
Stalls					
Bar, if BYO					
Sources		Personal Contact	In-house	Elsewhere	Adverts
Volunteers					
Full time					
Part-time					
Shift					
Administration		Indicate if details on separate pages			
Training					
Meal breaks					
Overtime					
Briefings					
Check in/out					
Parking					
Payment					
10.1 Committees		Indicate if details on separate pages, eg, terms of reference, dates of progress meetings			
		Chair	Secretary	Members	
Executive					
Finance					
Programme					
Public Relations					
Catering					
Accommodation					

11. Accommodation Requirements				Think about using an agency!		
Name of place		Address		Contact Name & Phone		
1						
2						
3						
4						
5						
Required Rooms		Single	Double	Suites	VIP	Other
Number						
11.1 Room Rates		FB, B&B?				
1						
2						
3						
4						
5						
11.2 Food Rates		1	2	3	4	5
Lunch						
Dinner						
BBQ						
Conf Dinner						
Reception						
Tea breaks						
Continuous tea						
11.3 Alcohol Charges for a function						
set price per head						
cash bar						
if we pay - tab per head?						
11.4 Arrivals & Departures		Majority arrive		Majority depart		
		Earlier arrives		Earlier departs		Later departs
Reservation forms		Cut-off date		Deposit required \$		
Who will produce & how?						
see 19.7						
Policy for refunds [7]						
Bookings		Agency	Individually	Conf Organiser	Other	
to be made by		0 0	0 0	0 0	0 0	
name & address of agency						

12. Meeting Rooms				Repeat page for each room?		
Room Name						Number people
Size	Length	Width	Height	Floor Covering	Preferred	Actual
Shape				Wood	0 0	
				Vinyl	0 0	
Usage				Carpet	0 0	
	eg, lecture, workshop					
Main Activities	sitting, standing, desks					
Other activities	registration, coffee etc					
Facilities	Lighting	Enough PPs	Air-con	Instant control	Central control	Windows open
	0 0	0 0	0 0	0 0	0 0	0 0
	pot plants?	0 0	dividers?	0 0	toilets?	0 0
Furniture	separate page if more details					
	No of Chairs	Type		No of Tables	Type	
Connection to adjoining rooms	0 0					
Likely noise disturbance	0 0					
Setting-up	Start date	Time	Help needed	From whom	Previous event	
Special requirements	eg, VIPs					
	Food to be served inside					
	Can be blacked out					
	Disabled access					

Planned layout



14. Standard Catering [Standard times and locations]

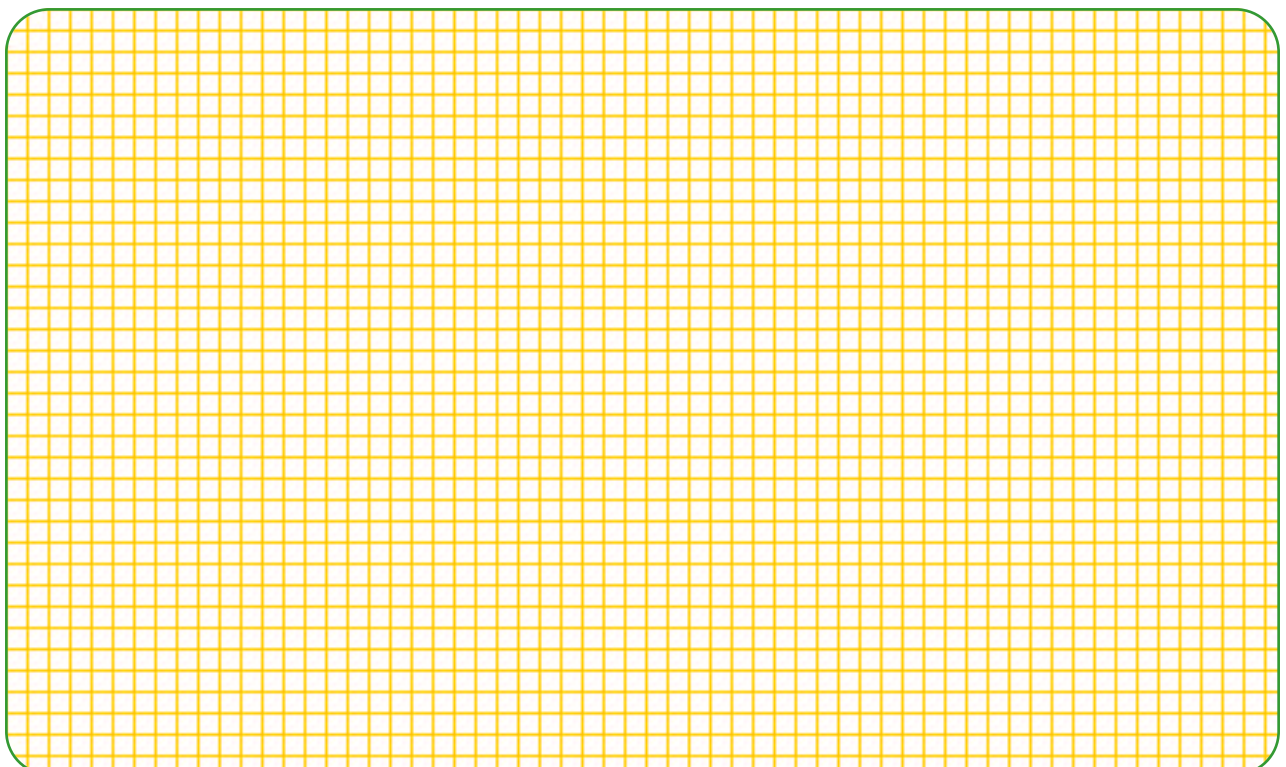
Standard Number indicate variations as appropriate

Day No	1	2	3	4	5	6	7
Date							
Day Name							
Variation in No.							
Continuous Tea							
Time							
Location							
Cost per head							
Arrival tea							
Time							
Location							
Cost per head							
Morning Tea							
Time							
Location							
Cost per head							
Lunch							
Time							
Location							
Cost per head							
Afternoon tea							
Time							
Location							
Cost per head							
Pre Dinner							
Time							
Location							
Cost per head							
Dinner							
Time							
Location							
Cost per head							
Post Dinner							
Time							
Location							
Cost per head							
Cash Bar							
Time							
Location							
Cost per head							
Special events							
Time							
Location							
Cost per head							
How to check actual numbers served?							
Deadline for changing numbers							

15. Special Event Catering Detail [opening reception, conference dinner]

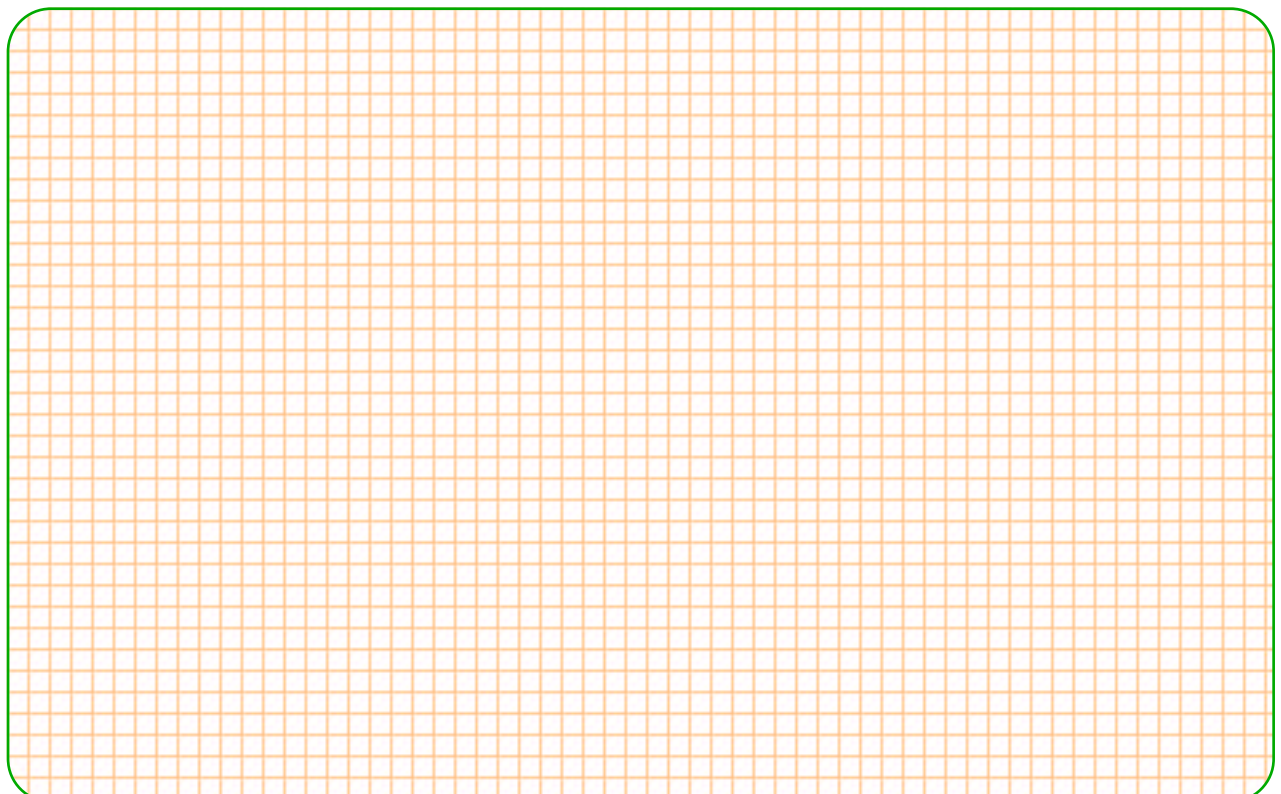
<p>Day & Time</p>	
<p>Location</p>	
<p>Menu [See 19.4]</p>	
<p>Alcohol [cash bar - licence? included in ticket, waiter service, cash on bar, wine/beer/spirits. See 19.5]</p>	
<p>Food service [cafeteria, buffet, waiter]</p>	
<p>Miscellaneous [music, national anthem, speeches, toasts, presentations, prayers, PA system]</p>	

Layout



17. Audio-Visual Equipment		[one sheet for each room?]			
OIC	0 0				
PA System	0 0	Operator	0 0		
Stand Mike	0 0	Roving Mike	0 0	Lapel Mike	0 0
VCR	0 0	Electroboard	0 0	Whiteboards	0 0
Portable screens	0 0	Fixed Screen	0 0		
Standard OHP	0 0	Flip charts	0 0	Notice boards	0 0
Direct OHP	0 0	Slide Projector	0 0	35mm Projector	0 0
Tape recorder	0 0	Radio	0 0	Disc Jockey	0 0
Computers	0 0	Printers	0 0	OHP connection	0 0
Powerboards	0 0	Extension leads	0 0	Leads enclosed	0 0
Leads taped down	0 0	Spares location			
WH&S checked by					

Layout sketch, safety comments, who will provide/pick up/return etc



18. Last Minute [Hour?] Check!				
			Complete separate sheet for each room	
Name of Room				
18.1 Facilities				
Seating plan		Spare seats		Spare tables
Temperature		Lighting & Dimming		Toilets
Noticeboards		Pens, pencils		Tablecloths
Signs		Flags, banners		Flowers
Lectern		Water & glasses		Notices, handouts
Curtains, blackout		Laser pointer		
18.2 Audiovisuals				
PPs working		Switches working		Extension leads
PA System		VCR Monitor		Slide projector
OHP		Tape recorder		Screens
Whiteboards		Electroboards		Flip charts
Pens, markers		Erasers		Spare globes
18.3 Security & Safety				
Exit doors clear		Signs		Evacuation procedures
Fire extinguishers		Ventilation		Disabled access
				Toilets
Money safety		Lost Property		
Valuable equipment storage				Locking rooms at night
First Aid Kit				
Medical emergency				
Action to be taken				
Phones numbers etc				

PRINTED NAME _____
 Date _____

Signature _____
 Time _____