

# SUCCESSFUL CONVENTIONS

START WITH CAREFUL ADVANCE PLANNING



**SHAW** Conference Centre

Convention Planning Guide

# Whether your event is large or small, the formula for convention success varies little. Along with a little ingenuity, your convention needs:

- clear objectives
- a good plan
- committed people to implement the plan
- sound financial administration

The measure of success for your convention depends on what you want it to accomplish. Effective conventions meet goals when planners have clear objectives and an overall vision for the event. A good convention plan turns that vision into reality and accounts for the myriad of details that require attention. Here are some hints to get started.

## STRUCTURING THE EXECUTIVE

<b>Chairperson:</b>	Responsible for the efficient and coordinated action of the entire committee structure. Reports to the Executive Committee of the convening organization.
<b>Vice-Chairperson:</b>	Acts for the Chairperson when absent and generally coordinates with the Chair on all matters.
<b>Treasurer:</b>	Supervises all financial transactions and records. You may wish this person to be bondable.
<b>Secretary:</b>	Maintains all files and records of the convention, issues meeting notices, keeps minutes of Executive Committee meetings and handles all general correspondence.
<b>Executive Secretary:</b>	This position, required for larger and more complex events, relieves officers and committees of more complex and time-consuming matters. Works in concert with the Chairperson. For a time prior to, during and after the convention, this office may need to be a full-time salaried position.

## SETTING THE PLAN (allow 18-24 months)

The Convention Planning Executive is responsible for creating and managing the overall convention plan and vision.

- Set objectives of meeting, convention or exhibition.
- Set dates and times.
- Determine target number of delegates.
- Confirm Shaw Conference Centre booking and contract details.
- Choose appropriate theme.
- Prepare list of sponsorship prospects, prepare sponsorship proposal and source financial support.
- Set up and monitor sub-committees, recruit volunteers.
- Engage contractors.
- Monitor finances, registrations and overall convention planning from the beginning through convention follow-up.

## COMMITTEES

Each committee should be given clear and specific instructions. Coordinating activities between the local organizing committee and national headquarters prevents confusion and unnecessary errors or duplication.

## FINANCE AND BUDGET (allow 18-24 months)

The Finance Committee sets the budget (sample below) and registration fees, manages all finances, determines expenditures and monitors revenues. The Finance Committee should also consider:

- Who makes payments for the various facets of the convention and when are payments due (e.g. speakers, human resources, venue)?  
Convention cash flow needs to be planned.
- Who is responsible to manage and disburse funds?
- What is the ticket price for the various functions?
- What is the cheque acceptance policy?
- What is the registration refund policy?
- How many meals are required (estimate low) and what are the anticipated meal costs (estimate costs high)?

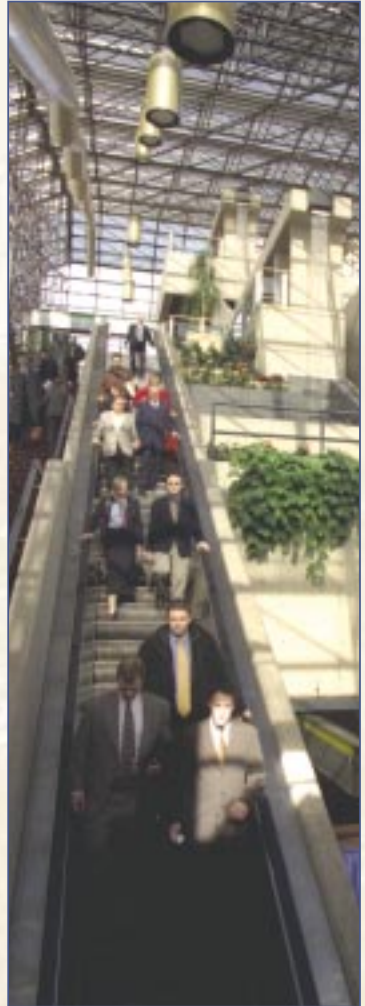
Possible budget items:

## EXPENSES

Audio-Visual (equipment and services)	_____
Companion Program	_____
Electrical/Lighting	_____
Entertainment	_____
Exhibit and Exhibit Space	_____
Gifts	_____
Gratuities	_____
Mailing and Postage	_____
Meals (whether borne by delegates entirely)	_____
Meeting Room Rental	_____
Miscellaneous	_____
Nutrition Break	_____
Printing (pre-mailings, programs, tickets, etc.)	_____
Registration (desk staff and materials)	_____
Reception	_____
Signs and Decorations	_____
Speakers and Invited Guests	_____
Staff (if extra help is required)	_____
Transportation (local)	_____
Translation (equipment and services)	_____

## INCOME

Registration Fees (delegate and companion)	_____
Partial Registration	_____
Contributions and/or Sponsorships	_____
Parent Organization Financing	_____
Exhibit Space Rental	_____
Other	_____



## PROGRAM (allow 18-24 months)

Planning and coordinating an interesting and informative program is the job of the Program Committee. The committee works closely with the Entertainment Committee in order to integrate with the convention's business and social functions together.

- Book meeting rooms.
- Develop a complete program schedule including all business meetings and social functions. The schedule should allow time for studying and exhibits, shopping and sightseeing, and various recreational activities.

- Confirm desired speakers well in advance of your convention.
- Inform the speakers of the type of presentation planned.
- Obtain biographical material for the speakers' introductions.
- Inform speakers of the time, date and the amount of time allotted for the presentation.
- Ensure that both parties understand financial arrangements for speakers.
- Print programs.
- Appoint a presiding chairperson for each meeting.
- Give written notice to each chairperson outlining the exact time, place and specific meeting responsibilities.
- Welcome speakers to the convention, give them programs and courtesy tickets and introduce them to convention officials.
- Arrange for any special properties your speaker requires such as whiteboard, pens, screens, projector or handouts.
- Prepare for an alternate speaker in case scheduled speaker is unable to present.
- Provide for any program changes and post for delegates.
- Prepare Speakers' Ready Room for speakers to test audio/visual equipment.
- Provide directional signs to meeting rooms.
- Immigration arrangements are needed for foreign speakers.

## HOUSING (allow 12-18 months)

The Housing Committee works with Edmonton Tourism and hotel staff to ensure you obtain satisfactory blocks of rooms and accommodation for all guests and delegates.

- Acquire hotel information and special convention rates to be included with promotional material.
- Pre-book a block of rooms in your headquarter hotel.
- Liaise with hotels regarding incoming reservations.
- Give the headquarter hotel the date when most of your group will arrive and depart.
- Determine if the accommodation for VIPs will be paid by your organization.
- If your convention will have exhibits, scout potential accommodations for exhibitors.
- Prepare for last-minute accommodation requests.
- When available, provide the headquarter hotel with the arrival and departure time and date for each delegate.

## PUBLIC RELATIONS (allow 12-18 months)

The Public Relations Committee promotes the convention to gain maximum attendance (focusing on convention targets and objectives) and publicizes the event. Good public relations help lead to convention success.

- Develop a communication strategy with branding and logos that reflect convention objectives.
- Design and distribute registration brochures / direct mail information pieces to promote attendance.
- Advertise in association newsletters, journals or other publications.
- Determine an information technology strategy (including Web site requirements and postings).
- Publicize in home town.
- Arrange for a photographer (including sale of photos to delegates).
- Send advance information on the convention to press, radio and TV.
- Invite the news media to meetings and banquets.
- Personally call local media.
- In advance, obtain copies of all speeches for the media.
- Ensure speakers and convention officers are available for media interviews.
- Set up a media room or headquarter area.
- Prepare news releases and speakers' photos for newspapers.



## WELCOME AND HOSPITALITY (allow 6 months)

The Reception and Hospitality Committee hosts delegates for all functions. This committee is responsible to warmly welcome all guests, media and visiting dignitaries.

- Prepare the hospitality suite.
- Create welcome banners for headquarters hotel. Welcome banners or posters are effective; greeters in costume add interest.
- Greet delegates and local dignitaries upon arrival.
- Prepare a guide of interesting places to shop and sightsee.
- Arrange for flowers (for speakers' and VIPs).
- Invite local dignitaries to special events and advise if they are expected to speak.

## EXHIBITS (allow 12-18 months)

The Exhibits Committee is responsible for obtaining exhibit space and serving exhibitors. While the committee handles all rental policies and facility arrangements, it also prepares material for potential exhibitors and information about the exhibits for all delegates.

- Prepare and mail an information folder on rental prices, available exhibit space, and overall exhibit floor plan to potential exhibitors.
- Check on availability of required utilities (power, lighting, etc.) in the exhibit area.
- Liaise with facility regarding regulations on size, weight and nature of exhibits.
- Check on floor load and ceiling heights, including truck door dimensions.
- Schedule timing for installing and removing exhibits.
- Check customs regulations for out-of-country equipment and/or arrange for a customs broker.
- Acquire liability insurance or protection against "loss or damage" of exhibitor materials, damage to the facility, or any injury incurred in the exhibit space.
- Plan and manage drayage (storage and insurance of materials received prior to the actual date of the event).
- Contact and/or contract a display company to assist.
- Prepare information material about the exhibits for delegates.
- Address security issues.

## REGISTRATION (allow 12-18 months)

The Registration Committee manages the convention's headquarters, information centre and registration area.

- Establish a computerized mailing list and registration database.
- Develop registration procedure for guests, dignitaries and delegates (including a policy regarding part-time registration).
- Acquire staffing for registration desk, including clerks, typists and cashiers.
- Provide all information, registration procedures and supplies to registration staff.
  - o Registration forms and badges, committee ribbons, etc.
  - o List of registrants for officials and the media.
  - o Computers, desks, tables, chairs and wastebaskets.
  - o Cash box, receipt book and float.
  - o Assign cashier responsible for registration fee collection.
  - o Sufficient registration forms, programs, pencils, note paper, etc.
  - o Posted instructions for filling out forms.
  - o Informative material on Edmonton and Alberta.
  - o Information desk and clerk.
  - o Bulletin board for messages and phone calls.
  - o Facilities for photocopying, faxes and e-mail.



## ENTERTAINMENT (allow 12-18 months)

The Entertainment Committee is charged with all entertainment for the various banquets, luncheons and social events.

- Plan special entertainment for regular program.
- Plan all social functions including music, entertainment and shows.
- Provide the facility with a "guaranteed" meal count.
- Decorate for banquets and social functions.
- Determine number of places to be set at banquet.
- Set up banquet tables.
- Assign head table placements (appoint someone to direct those seated at head table).
- Prepare favours, menus and place cards.
- Determine exact serving time.
- Prepare a printed program and menu for each banquet.
- Provide for meal tickets and collection.
- Manage ticket sales for latecomers.
- Arrange sightseeing tours.

## COMPANION PROGRAM (allow 6-12 months)

An interesting Companion Program should not conflict with the delegates' program. Balance the program with a variety of activities and avoid over-scheduling events. Allow ample free time for shopping and personal recreation.

- Provide a hospitality room and serve refreshments. This room may include periodic craft displays or demonstrations.
- In conjunction with the Hospitality Committee, prepare and include an information sheet of specialty shops, antique shops, galleries, restaurants, etc. that guests might enjoy.
- Prepare schedules of other events (such as theatre productions) during the convention.
- Guided group tours can be arranged for many of Edmonton's attractions. A luncheon or coffee to conclude the tour may be appropriate.
- Edmonton Tourism can suggest speakers, entertainment or special attractions suitable for your companion program.
- For variety, consider planning a sport activity, tennis, golf, bowling and much more is available in Edmonton.
- Send pre-event information about what is planned for the companion program so companions can bring appropriate attire.
- Work closely with registration chairperson to determine how many companions are planning to attend.
- Consider a small gift or souvenir for each guest.

## YOUTH PROGRAM (allow 6 months)

Will there be children attending the convention with their parents? If so, consider:

- Childcare arrangements.
- Special activities, transportation and meal arrangements for children.



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