Guide to …

Event organisation

The following is not intended to be detailed or comprehensive – it is a simple guide/checklist. Nor is it necessarily a linear checklist – a number of items overlap and inter-relate. For example, sometimes elements of the programme are dictated by the nature of the venue. Do ensure that your event is accessible to everyone.

Basics

Understand:

- The reason behind the event being organised.
- The community at whom the event is aimed.
- Parallel/complementary issues/activities within that community.

Then decide on:

- Topic/theme
- Whether it should be a joint event with another *agency*
- Duration
- Location
- Accommodation
- Timing

As early as possible, check with UCISA Admin on the UCISA Calendar.

Planning team

- Keep it small.
- Ensure you include at least one person that has previous experience in event organisation.
- Assign responsibility for complete components of activity to individuals (eg the web presence).

Programme

- Don't have a welcome which is only a welcome by a dignitary – make the welcoming speech into a *proper* presentation.
- Don't overcrowd … build in gaps – for refreshments and networking.
- Consider *interactivity* (though if you have discussion groups, don't feed back at the event – the worst word in the event lexicon is *rapporteur* – use subsequent email or web reports).
- For multi-day events, consider a *social programme*.

- Mix *vision* with practical reality.
- For large events, balance speakers from within the community with those from without.
- Funded, *flagship* projects are always a source of speakers.
- A theme may make it easier to attract sponsors/exhibitors.
- Sub-themes may make it easier to attract day delegates to a multi-day event.

Speakers

- Give them guidelines: tell them what facilities will be available (and what won't).
- Nag them nicely to deliver abstracts, PowerPoint presentation, etc – have an escalation procedure for when they don't!
- They are important! Treat them with care.
- Maintain contact with them.

Venue

Find one! – with reasonable access, bearing in mind any special requirements for people with disabilities. Ask UCISA Admin for advice.

Check:

- Rooms (main, syndicate etc).
- Catering arrangements (speed of service?).
- AV (projectors, sound systems etc), network access and technical support.
- Disabled access.
- What comes *free*, what's extra and what won't/can't be provided.

Accommodation

Is it appropriate for the target community?

Legal issues

You need a formal agreement/contract with all your suppliers. They will normally present one with their standard terms and conditions – these are usually OK, but check the small print.

Health and Safety

You may need to present the venue with a Risk Assessment. UCISA Admin can advise. Check access to first aid.

Budget

- UCISA Admin can provide a budget template.
- Identify fixed and variable costs.
- Calculate a breakeven delegate number/fee balance.
- Round up and add a contingency.
- Consider the *market price* and adjust parameters (especially costs) until delegate numbers x delegate fee plus other income covers costs and meets the market price.
- Consider risks – establish decision dates for any cancellation, and consider sharing risks with partner organisations.
- Remember to include the £10/head/day event UCISA Administration charge for all paying delegates.

Sponsorship

Consider sponsorship of:

- the event
- some component
- gifts

Promotion

Do it!

Well enough in advance. It is crucial to the success of any event that it is advertised and promoted far enough in advance and as widely as possible.

Booking

- Handled by UCISA Admin.
- Make it easy!
- Set the booking deadline in line with cancellation arrangements.

Joining instructions

- Make sure your delegates get to the right venue on the right day!
- UCISA Admin will send out joining instructions (including any specific information you furnish them with!).

Delegate packs

Consider what is appropriate and let UCISA Admin know.

At the event:

- Assign *minders* to speakers – these could be the session chairs or group committee members.
- Make sure delegates see a welcoming face.
- Make sure signage is effective to (and between) rooms.
- Check there is a *primary contact* amongst venue staff – for when things go wrong (and have your own *Fixit* to liaise with them).
- Consider having a *room monitor* to check all is OK before the event and at breaks (refreshing speakers drinking water etc).
- Make sure equipment, and delegates belongings, are secure.

Evaluation

- UCISA Admin has templates.
- Analyse and act upon it!

After the event

Is too late for most things! but…

- Thank speakers (and others).
- Make sure all bills are addressed and sent to UCISA Admin in Oxford as soon as possible.
- Consider a report – but report on issues/content, not process.

Remember in all this …

- Printers have long lead times.
- Volunteers need coaxing and encouraging.
- Speakers need cherishing.
- ***UCISA Admin is there to help.***

Now for the nitty-gritty! More detailed information to help you along:

Pull together an event committee which must include a) a local contact for liaison and b) someone with previous experience of event organisation. The breakdown of jobs will split between the Committee, the Local Organiser and UCISA Admin.

The Committee will be responsible for the following:

- Agree the date of the event with UCISA Admin.
- Draw up budget and send to the Treasurer with a copy to UCISA Admin. UCISA Admin can provide you with a budget template. This should include the number of delegates required to break even and the date (Decision Date) on which the decision will be made to proceed or cancel.
- Event publicity: information on the website (which should include details on the target audience and at the very least, an outline programme), inform UCISA Admin of the link, email Group correspondents, directors and announce; provide short announcement for *UCISA Update* (max 50 words), reminders (if necessary) of event.
- Remember that, if you are paying a fee to any trainers or presenters, you should cost in the tax and National Insurance (NI) that will be deducted. You should make the presenters aware that they will be taxed and suggest that their fee is collected by means of an invoice from their home institution who will be best placed to deal with these matters. If this arrangement is impossible, then UCISA Admin can deduct tax and NI providing they know the speaker's NI Number, Tax Code and date of birth.
- Ensure any speaker expenses are agreed before the event and advise UCISA Admin of the details.
- UCISA Admin can provide you with *Chair* and *Speaker Guidelines*.
- The booking form template www.ucisa.ac.uk/siteinfo/templates/event-bkg should be completed by the event committee (bearing in mind it feeds into a database to allow automatic UCISA administration).
- Other useful templates, such as a sample event budget, are available at www.ucisa.ac.uk/siteinfo/templates.
- Send booking form to UCISA Admin for checking before uploading to website.

- Discuss with UCISA Admin possible arrangements for accepting people after the deadline.
- Ensure details of exhibitors, speakers and sponsors are recorded in the UCISA Admin event database. Where charges are to be made, booking forms must contain an order number.
- Ensure there is the facility to make speaker notes/information available in offline accessible formats on request.
- Request a rough head count of delegates from UCISA Admin close to Decision Date and decide to proceed or cancel the event. Relay the decision to UCISA Admin and act accordingly.
- Prepare a checklist of inserts for delegate packs and send UCISA Admin a copy.
- Prepare electronic copy of delegate pack inserts and send them to UCISA Admin for inclusion.
- Expand web information to include: maps, directions, speaker's slides/notes.
- In the event of cancellation, the Committee will liaise with UCISA Admin to ensure proper arrangements are made.
- Liaise with speakers and provide UCISA Admin with list of expenses and claimants so that payment can be made.
- Prepare and send *Thank You* letters where appropriate (speakers, sponsors etc).

Once an event has been arranged, UCISA Admin will

- Update the calendar of events.
- Confirm any bookings made on behalf of UCISA when advised of the details.
- Add a link from the published booking form/information flyer url to the main UCISA calendar.
- Include information of the event in UCISA *Update*.
- Receive and confirm bookings by email and respond to any special requirements made. Bookings will only be via online booking forms. Anyone encountering problems submitting a form will need to print it out.
- Provide the committee with a rough head count of delegates by Decision Date. In the event of cancellation, UCISA Admin will liaise with the Local Organiser and Committee to ensure proper arrangements are made.
- The database will:
  - automatically collect booking forms
  - provide list of delegates
  - provide accommodation reports
  - provide catering reports
  - provide badges
  - delegate email list (on request)
- Send out joining instructions using information provided by the Local Organiser (ie maps, travel instructions).
- Prepare badges for delegates and provide a few blank badges for last minute changes.
- Arrange photocopying of information for delegates pack.
- Assemble delegate packs, which will contain the programme, delegate list, evaluation form and any reasonable additional items received by the closing date.
- Arrange delivery of the delegate packs.
- Arrange payments of expenses to claimants.

The Local Organiser role will normally (but not necessarily) be undertaken by someone local to the event and will include the following (not all will be relevant for all events):

- Organise the venue: booking lecture rooms, accommodation, catering, AV, exhibition facilities/layout etc.
- Liaise with speakers, exhibitors and so on about requirements.
- Make arrangements for any social events.
- Prepare travel details and send to UCISA Admin.
- In the event of cancellation, the Local Organiser (via the Committee) will liaise with the UCISA Admin to ensure proper arrangements are made.
- Onsite UCISA Administration during the conference
  - staffing of registration desk
  - interface between delegates and hotel if needed
  - housekeeping notices
  - signage
  - buses/taxis on arrival, departure (where necessary)
  - provision of user-ids for email facilities or workshops
  - *on-the-day* arrangements for parallel sessions
  - photocopying of additional material needed
- Liaise with any sponsors, exhibitors.
- Post event: return a copy of the registration list to UCISA Admin with non-attendees and name changes marked.
- Be responsible for collecting and returning the badges to UCISA Admin.