CORPORATE CONFERENCE

&

EVENT PLANNER

This is a demonstration reference manual. Most of the actual content has been removed so the manual may be reviewed in the shortest amount of time. If you are interested in purchasing the manual and training please contact us at www.centerpt.com, email information@centerpt.com or call 480-9483100.

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This Table of Contents is for demonstration purposes only. These topics and page numbers are from the original reference manual.

Acknowledgments

Conference & Event Planner

Introduction

Purpose	The purpose of the Event Planner is to provide support for the creation, execution, and evaluation of events, including seminars, workshops, and conferences.
	The Event Planner will be useful in planning events of all sizes, from an event of a few hours to a week long conference.
	Events are held to educate or train, to solve problems, and to provide briefings.
Organization	The Event Planner is organized with chapters 1 and 2 for use by those responsible for planning and organizing events. The first chapter is about scoping and planning an event. For a large event, the activities are normally performed by a Steering Committee. They may be performed by one person for an event of a day or less.
	The second chapter is about developing support for an event. For a large event, the activities are normally executed by a Program Committee and by one or two people for smaller events.
	Chapters 4, 5, and 6 are provided for three additional groups involved with events, the presenters, the participants, and the logistics support people.
How to use the Event Planner	Those who are scoping, planning, and developing support should read the first two chapters. For a large event, the Steering Committee and the Program Committee should review the entire Event Planner. The presenters, the participants, and the logistics support people may use only the applicable sections of the book.

1. Review the book briefly.
2. Select the chapter(s) that apply to you.
3. Read the chapter.
4. Use the checklists or other tools.

Introduction, Continued

Event size

Events may be large, small, or any size in between. There are two dimensions to event size, the length of the event and the number of attendees. An event may be called workshop, seminar, presentation, class, meeting, or conference.

The largest events are usually a week long and are often referred to as a conference. The smallest events may last just a couple of hours. One and two day events are common.

The largest events may have hundreds of people. The smallest may have twenty, or even fewer.

The structure of an event combines these two elements. There may be an event of several days with few attendees. It is unlikely, but a short event might have a hundred people or more. Normally, an event attended by many is several days long. Short events are usually attended by fewer. Most events fall somewhere in between.

Event purpose types

There are three basic types of purpose for an event. An event is held to educate or train, to accomplish a problem solving or planning mission, or to provide informational briefings. Events often include more than one purpose.

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The introduction includes the following topics.

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Chapter 1
Scoping and Planning an Event

Overview

Introduction   Scoping and planning an event can be described as the execution of high level tasks needed to set the stage, give policy direction, and assign key individuals to carry out the plan.

Scoping and planning an event often is the function of a Steering Committee for a conference. If an event is a day or less, one person may perform the function. Always address these issues, whether by committee for a large event, two or three people for a middle size event, or as an individual for a small event.

The purpose of an event could be to educate and train, to accomplish a problem solving or planning mission, or to give informational briefings. A conference may serve more than one of these purposes. Informal face-to-face exchanges are a vital part of an event. An event provides an opportunity for synergy and breakthrough thinking to develop among participants.

This chapter covers the topics that create the foundation for successful development and implementation of events.

Table of contents   This chapter includes the following topics.

Overview, Continued

Milestone chart   The milestone chart covers activities a Steering Committee usually performs. This chart deals with scoping and planning activities only. Complete milestone charts for large and small events are in chapter 2, *Overview*.

Task	Responsible	Prior to the event	Due Date
Determine that an event may be needed.	Manager(s)	9 to 12 months	
Recruit a Steering Committee, including Program, Logistics, and Communications. Appoint Steering Committee chair(s).	Manager(s)	9 to 12 months	
Write the business needs.	Committee	9 to 12 months	
Write the purpose statement.	Committee	9 to 12 months	
Develop a theme and get management buy-off.	Committee	9 to 12 months	
Analyze the audience. Specify any criteria for participation.	Committee	9 to 12 months	
Define the program's major ingredients.	Committee	9 to 12 months	
Write the objectives the event is to achieve.	Committee	9 to 12 months	
Establish the budget.	Committee	9 to 12 months	
Prepare a high level milestone chart for Program, Logistics, and Communications.	Committee members	9 to 12 months	
List event evaluation criteria.	Committee	9 to 12 months	
Schedule status and review meetings.	Committee	9 to 12 months	
State date or location restraints and recommendations. Define the time line.	Committee	9 to 12 months	
Give the Program Committee safety and security issues.	Committee	9 to 12 months	

Chapter 2
Developing Event Support

Overview

Introduction

Developing event support means carrying out the tasks to make an event successful. For a conference, a Steering Committee provides direction by creating appropriate sub-groups, such as Communications, Logistics, and Program. They provide inputs to a high level milestone chart. For a small event, one or two people may develop event support.

First, the sub-committees expand on the milestone chart from the Steering Committee. Then they assign a responsible individual and due date for each task, and establish a regular meeting schedule.

Pre-conference, conference, and post-conference activities set the stage for an event, ensure it runs smoothly, and provide for the necessary follow-on work.

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This chapter has three sections.

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3	After an Event	75

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Chapter 3
Presenter's Guide

Introduction

Purpose   The purpose of the Presenter's Guide is to assist presenters throughout event involvement. You need to know how to submit a paper, or how to prepare and deliver material.

Table of contents   This chapter includes the following topics.

Responding to the Call for Papers

Introduction
Usually the first time you hear about an event, a call for papers is announced. The announcement may appear as a poster in the hallway, a web site or an email.

Smaller events do not use a formal call for papers. Your first contact may be a call from the person responsible for the event.

Ask yourself?
Answer these questions to your satisfaction before responding to a call for papers.

- Do you have a message that serves the purpose and objectives of the event?
- Does what you want to convey add important information on the topics or projects?
- Will you meet the needs and wants of participants?
- Do you have adequate time to prepare?

Action plans
Complete the call for paper's response by answering all parts of the request.

- Read the purpose, objectives, and general descriptions of topics.
- Write down your answer to the question "How does my proposed presentation help meet these goals"?
- Put your presentation title under the objective it supports.
- Prepare the abstract according to the criteria given in the call for papers.

Chapter 4
Participant's Guide

Introduction

Purpose The purpose of the Participant's Guide is to facilitate your learning during the event, to help you fully engage and prepare for a rich learning experience.

Table of contents The Participant's Guide has two topics.

Planning Before the Event

Introduction	Preparing yourself for the event will help make the event experience more valuable and enriching.
Ask yourself?	Why are you planning to attend the event? What do you need to move forward with your work assignments?
Action plans	Read the agenda to gauge whether the event is right for you. Plan to attend sessions that will contribute to your effectiveness on the job. • Classes where relevant research findings are presented. • Sessions by peers doing the same type of work as you. • Demonstrations where you can see things working that you might use.
Align with your interest	How do the purpose and objectives of the event align with the work you do? Read the purpose, objectives, and general descriptions of topics. Answer this question in your mind, "How will my work be improved by attending this event?" List what you plan to gain from the event.
Schedule	Draft a schedule to support your personal objectives. You might select two sessions for each hour. If one session is not what you expected, or full, you will be able to attend the other session. You may want to coordinate your schedule with co-workers. It may be valuable to attend a session together or to attend different sessions and swap information later. These scheduling options will more likely apply to large events. Smaller events have fewer scheduling options.

Making the Most of the Learning Opportunity

Introduction   There are things you can do to improve the value of an event.

Tips   Use the tip sheet to create a rich learning environment for yourself.

Learning Tip Sheet
➤ Before you leave home, mentally prepare to learn by clearing your mind. and desk. Do not plan to call the office at breaks or meals.
➤ Plan to do more listening than talking overall.
➤ Be on time.
➤ Sit near the front with an unobstructed view of the speaker.
➤ Listen attentively in the sessions.
➤ Ask questions and make comments appropriately

➤ Use your best learning style.
 	
  • Listen to learn.
 	
  • Highlight or underline.
 	
  • Write notes, using the style most effective for you.

➤ Write down the best idea for use in your work now.
➤ Write down an idea you would like to use in the future.
➤ Find someone in each session to talk with about the session.
➤ Arrange to stay in touch with the instructor. Get an email address.
➤ Have a meal with the instructor.
➤ Have a meal with other participants and arrange to stay in touch.
➤ At the end of the day, review the material and notes from the day's sessions.

Making the Most of the Learning Opportunity, Continued

Learning skills   Research indicates optimal learning skills fall into four component skill categories.

1. Asking the right questions and knowing when you have asked enough.

2. Identifying the essential components within complex ideas and tasks.

3. Finding informal ways to measure your understanding of material.

4. Applying these skills toward the goals of specific job tasks.

Chapter 5
Logistics Guide

Introduction

Introduction   The purpose of the Logistics Guide is to facilitate logistics task management. For a large event, one Company Name employee, usually the Logistics Program Committee chairperson, has ultimate responsibility for logistics.

For small events, one person usually handles logistics. Chapter two, *Overview*, has a composite milestone chart for small events that includes logistics tasks. An example milestone chart for large events is included in the *Planning Logistics* topic below.

Table of contents   The Logistics Guide has includes four topics.

Planning Logistics

Introduction

Logistics tasks are performed in sequence and parallel. A well-executed logistics plan brings the details together at the right time to create an excellent event. By putting a logistics plan together, interdependencies become evident.

There will be fewer tasks to complete for a small event or for a local event.

Action Plans

One of the most critical functions for a large event is to divide the task's responsibilities among the Program Committee in the most workable fashion.

- Check the Steering Committee recommendations. Reorganize the committees as needed.

- Review the milestone chart provided by the Steering Committee.

- Write the logistics plan milestone chart before starting the activities, using the example as a basis for your chart.

- For a smaller event, you may use the composite milestone chart in chapter two, *Overview*.

Program Committee chairs

Typically you will need the following program committees for a large event.

- Technical Program Committee - determines the topics and projects to support. They are responsible for the best possible technical and educational value. The committee develops themes for panel discussions, and selects keynote topics and speakers.

- Publicity Committee - publicizes the event so that the maximum number of the right people attends and those for whom the event does not have value do not attend. Publishing may be a subset of this committee or a separate committee.

- Logistics Committee -- coordinates the work of those who make physical arrangements. They work with vendors, Company Name employees, and IMS to ensure hotel arrangements, transportation, computer support, and other aspects of logistics are carried out.

  Note: Depending on the circumstances, you may need additional committees.

End of this demonstration reference manual