

Planning an International Conference?

Tips for Local Chairs and Organising Committees

Date of publication: August 2011



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Tips to get started for local associations

Introduction

The responsibility of hosting many association conferences is taken on by an individual or group from the professional community on behalf of the umbrella organisation. This is a task that is time consuming and requires considerable planning. Additionally the professionals who undertake this function are doing so over and above their day-to-day commitments.

This paper aims to provide some helpful ideas and suggestions for these “willing volunteers” on:

- how to approach the initial planning stages;
- how to determine and set timelines that will work for their specific conference; and
- to highlight some of the main factors that will have an impact on all of the above.

Getting Started

There are many factors that will impact timelines and initial steps to be taken when planning an event. The 3 main influencing factors are likely to be:

- What is the timeline for bidding and being awarded the hosting of the conference?
- What is the frequency of the conference – annual events might be limited in what can be done in terms of marketing, promotion, developing content etc ahead of the preceding year’s event.
- Are there deadlines that are “normal” or “usual practice” for the event?

It may be difficult to specify exact norms for conference timelines as some events may require special lead times of up to four years due to their size, complexity or frequency. In other cases the opposite may be true and lead times may be just a matter of months. Finally what may be more important than the specific timelines, are the milestones to focus on, or the order in which planning and organisation of the event is undertaken.

Gathering Information

From the onset of the decision to bid on hosting a Meeting or Conference, it is essential to gather as much information from the umbrella society or association about what their expectations, objectives, division of roles and responsibilities are. Historical information from previous events is also very useful because this will provide a more complete picture, at an early stage that will enable more informed decisions to be made about the approach to planning. This will also inform what the conference requirements are likely to be so as to minimise “surprises” as much as possible further into the planning process.

Things to consider at the earliest stages:

- Locations of past conferences and the types of venues and facilities used
- What is the next open year?
- Is there an official tender document (guideline for bidding)?
- What are the specific conference requirements (meeting rooms, exhibition space, accommodations, social events...)
- How has the conference evolved and progressed over the past years? Are numbers increasing, are they reducing, are the number of scientific submissions changing? This can be useful to make educated estimations for the event you are planning.
- What are the financial responsibilities? Who controls the budget? Are there budgetary obligations? Who assumes the financial and legal risk?
- What are the roles and responsibilities of the various parties? For example, these can be the parent organisation, any international or national committees, the local hosts, the local supporters such as the City, Region, Academic establishments etc?

Support and Resources Available to You

For many who take on the role of ambassador and local Conference host, it is often done in addition to other professional and personal commitments. Therefore it is important to try and involve others that can help “share the load” and add value by bringing knowledge and expertise as well as sharing some of the tasks involved.

It is important to have a realistic assessment of the requirements involved in hosting a Conference and the time allotments needed by the host and his/her colleagues. It is also important to evaluate the skill set present within the host’s department and organisation and who/what can be available and committed to the planning process. Early preparation in terms of understanding available resources allows for identification of potential gaps. The good news is that there are many sources of support locally that can provide help.

Within the City and Region, there are experts in the Convention Bureau and City Council who can advise on venues, infrastructure, and suppliers. These individuals have the experience from previous events held in the city. There also are professional companies (PCOs or Professional Conference Organisers) whose main expertise is managing Conferences. It may be the most viable and efficient option is to have such professionals manage some or all of the aspects of a host or organiser. These organisations and companies are there to advise you, and will do so before you need to commit.

Building the Event Timeline Outline

This step involves gathering information, bringing together the right team, and bringing this all together in order to construct the outline and picture of the event to fulfil the criteria and expectations of the parent association. Ultimately this outline would provide for content that is topical and current in terms of subject matter in order to attract the right audience and provide target and active participation levels.

As part of defining the scope of an outline, the following should be considered:

- Do you have the support and involvement of the related national industry/association, local academic or professional bodies as well as the as Local Authorities (if applicable)?

- What venue options are there in your locale that will provide suitable facilities to hold the conference?
- Infrastructure and access – what is the accessibility for nationals who commonly attend the conference to the preferred location? What are the general conditions for infrastructure and logistics once the participant reach the selected destination?
- Have the scheduled or preferred dates for the perspective conference taken into account other events or conferences occurring at the destination at the same time? Additionally have conferences organisers studied seasonal/monthly impact on the destination such as high/low seasonal periods, public or religious holidays, and any other occurrences which influence infrastructure or accessibility to the city in question?
- What is the availability of conference facilities and hotels for the proposed dates?
- When will the event be awarded and what is the process and decision making steps for bidding?
- Obtain written offers from key suppliers, primarily the venue which includes details of the space available, quote for facilities and what is included and excluded in the overall price.
- Ensure a written confirmation for a **provisional booking** (do not sign a contract at this stage) is put in place at the onset so that you are guaranteed the venue will be available to you.

Managing the Risk

It is strongly recommended that **before** taking on the responsibility to manage a conference that careful consideration is given to the full commitment and risk involved. Taking on this commitment can be fulfilling and rewarding in many ways, **and** proper effective governance and fiscal planning should be put in place before this can be undertaken. Large events can bring significant contractual as well as financial responsibility, so to minimise the risks, there are a number of steps that we strongly suggest are considered:

- Who is assuming the financial risk of the event?
- Who is entering into contracts with suppliers and service providers?
- What insurance coverage do you have in place to protect you, the stakeholders and the participants at this event?

Although some aspects may sound quite daunting they are very much manageable. It is strongly recommended that if such expertise is not available within your organisation then bring in this expertise from professionals who can provide this knowledge.

Two top tips:

- Once you have defined your event scope, even ahead of your hosting bid confirmation, draft a budget. Only by drafting a comprehensive and detailed budget, based on the criteria defined for your location, can an accurate assessment of likely expenditure be determined. This way it can be decided if the income needed to be generated to support the event is realistically achievable.
- **Avoid** signing any contracts until there is a formalised relationship with the entity which will be managing the event (such as a PCO or other organising partner). If you go ahead and sign contracts in your own name, that is not supported by your professional organisation, then you could be leaving yourself personally exposed to unacceptable levels of risk.

Additional Resources to Assist in the Planning

Congrex, have developed a number of white papers that may assist you when planning the organisation of your Conference.

The current whitepaper topics covered include:

- The great venue dilemma: How to decide your next conference destination
- Defining roles – The key to organising a successful meeting
- International hotel contracts
- Cash flow management for your event
- Marketing your event: keeping your attendance levels
- The role of the PCO

If you would like to obtain copies of these please visit Congrex's website:

<http://www.congrex.com/resources/whitepapers.aspx>

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