

How to run a successful conference

A GUIDE FOR NON-PROFIT ORGANISATIONS

by Graeme Eggins

This guide is based on experience of various commercial conferences and trade fairs and specifically on the two-day Network-U3A conference held in Lismore in March, 2007.

1. Establish the aims of your conference

Without aims, you have no criteria to guide your planning.

Do you want to ...

- Provide a venue for discussion and social interaction on important topics?
- Promote your organisation with the aim of attracting more members?
- Educate the wider community about your group?
- Attract the maximum number of delegates?
- Make a profit or just cover costs?
- Teach delegates new skills?
- Something else altogether?

Once you have established your key aims, ask: "Is holding a conference the best way of achieving my aim?" Perhaps a cheaper or easier alternative could be found such as a teleconference, a short seminar or by mailing printed or audio visual information.

If you decide a conference is the way to go move to step 2.

2. Select an organising committee

The old adage "If you want something done, ask a busy person" is true.

Only select people who will act rather than waste time theorising about what should be done. Ensure every member has set tasks and will be still available when the conference is held.

Set concrete goals and review progress in regular, minuted meetings.

For most conferences you will need...

- A conference chair who is not too proud to wash up teacups if needed. The chair should be a leader, a diplomat who can inspire confidence in others and who has a clear sense of what needs to be done

- A financial director to set a realistic budget, keep track of income and expenses and advise on suitable purchases
- A well known and respected member who can liaise with similar State or regional organisations and get their support
- A marketing/publicity person to devise a marketing plan and then implement it
- A community liaison officer to help delegates with accommodation and travel information and also possibly arrange social gatherings including the official dinner (if there is one)
- A technical officer/s who can run and/or supervise the operation of AV and other equipment

Ideally the conference organising committee should report to, but be separate from, the group's main management committee. Separation ensures focus is kept on the outcome.

3. Start planning

Planning should commence immediately the go-ahead is given. For most non-profit organisations, conferences are annual affairs so you should have at least 10 to 12 months notice.

The chair of the organising committee, in consultation with the other members, should define what needs to be done.

Usually the tasks, in approximate order of priority, are to ...

- agree the aims of the conference
- appoint an organising committee
- set a suitable date
- determine a budget
- find and book suitable venues
- create a theme
- identify and invite speakers
- develop a programme
- plan the publicity and marketing campaign
- design delegates' badges and conference kits
- assess likely equipment requirements, including audio-visual
- Catering

Now let's look at the tasks in detail

Setting a date

For established community groups, a conference date is usually fixed because the event is always held during a particular month.

If you have a choice, pick a date which does not clash with big popular events, is not on or near a public holiday and when the weather is usually mild.

The length of a conference – one day, two days or more – depends on what you want to achieve.

Determine a budget

Proper budgeting is vital. Some non-profit groups aim to be revenue neutral – i.e. to charge enough to cover costs but not so much that they discourage attendees. Others actively seek to make a profit (see conference aims).

Some groups may be able to get financial help from a parent organisation, from commercial sponsorship or from local or state government. Find out early if your organisation is likely to qualify for a grant.

A simple break-even analysis is useful. This is simply a method of determining the exact point at which the conference makes neither a profit nor a loss.

Step 1.

How many delegates can you expect? If you have access to figures for previous conferences, just add 10% or 15% and use that as your attendance figure.

If the conference is new, survey probable delegates to estimate what proportion of your total audience is likely to attend. Then determine an attendance figure.

Let's say you will predict 70 delegates but decide to plan for 80 to be safe.

Step 2

Work out your **fixed costs**. These include venue rental, equipment hire, promotional printing, stationery, bank fees, (possibly) insurance and gifts for speakers.

You may also decide to pay part of the travel or accommodation costs of a presenter.

Let's say your total fixed costs are \$2000.

Next calculate your **variable costs on a per-head basis**. The main variables are usually meals - afternoon/morning teas and perhaps a formal dinner.

Let's say an acceptable venue has offered you the best two-day catering deal –\$30 per head for two light lunches and morning/afternoon teas.

In addition, a restaurant quotes \$40 a head for the formal dinner without drinks. Your variable costs are then $\$30 + \$40 = \$70$.

Now add your per head fixed and variable costs - i.e. \$2000 plus \$5600 ($\$70 \times 80$), making a total of \$7600.

If you get 80 delegates who each pay \$95 you will bank \$7600 and pay out \$7,600. Your conference will be revenue neutral.

If you get 70 delegates you will lose \$700, if you get 90 you will make a \$250 surplus.

In the example above the conference fee was \$95. Then add at least 10% - 15% is preferable – for contingencies. Round the figure up (in this case to \$110) and that is your basic per person conference fee. (always ask for it in advance).

Of course, if the parent body or a government department has pledged to give a grant, you can reduce your registration fee accordingly.

You can encourage more people to attend by offering a reduced fee to attend just one day or one session or by offering an “early bird” discount.

Delegates often arrive with partners who have little interest in the meeting. However many partners are happy to pay to attend the dinner if you offer one.

A float of \$700 can be enough to cover preliminary expenses for a 150-person non-commercial meeting.

Normally you don't pay your biggest costs – venue hire and catering – until after you have banked your registration fees.

A non-profit organisation can save money many ways, for example by using volunteers instead of paid staff to register delegates and to email rather than post receipts for conference fees.

Select a suitable venue

Inspect suitable local venues after you have estimated likely numbers. Registered clubs are often cheaper than other accommodation because governments encourage clubs to support non-profit organisations.

Features to look for:

- flexible room layouts (ask if additional rooms be booked, opened out or reduced in size if required)
- a reliable and effective PA system
- a well accepted standard of catering (see separate entry)
- quiet and effective air conditioning
- ample free speaker aids like whiteboards, display boards and lecterns
- ample parking, (possibly) including for buses
- disabled access and facilities
- if possible, easy access to the outdoors
- if needed, space for table or wall displays

Some rented rooms can be too light and bright for the audience to easily see graphics from data or slide projectors. Ask venue management if extra curtaining can be provided.

You may also be able to use wheeled whiteboards and display panels to block sunlight or outside reflections. The local tourist office may lend you display panels and/or posters to double as blinds.

Ask for a floor plan and use it to work out dispositions of chairs, tables, AV equipment etc.

If you can, get quotes from at least two venues. Ask the latest date at which numbers attending have to be confirmed. Do you have to pay anything if you are forced to cancel?

Make a decision and book early so you are guaranteed of get the rooms that suit you best.

Book the catering based on estimated numbers with an option to adjust much nearer the date.

Create a conference theme

A well-chosen theme makes a conference memorable by giving it a heart, a centre of attention.

Try to be specific rather than general. “Our next five years” is better than “Our future.”

Consider running a contest within your group to select a theme. A competition will help members become more interested in what you are planning.

If you have an attractive logo, use it in association with your theme in all your promotional material.

If you don't have a logo, consider designing one just for the conference. Again, consider asking your artistic members for ideas – but have the designs judged by someone outside the group!

Finding speakers

Good speakers make a programme memorable.

Resist the urge to invite the “usual suspects” – the mayor or your MP unless they can say something new and interesting. Otherwise you will get the same old boring stuff they've recited hundreds of times before.

Hopefully your conference committee will already know good prospects. If you are inviting someone who you have not heard speak personally, check them out.

Ask known good speakers to recommend someone.

Don't overlook the opportunity of inviting an overseas speaker. You may be able to organise a video recording of them which can be shown to inspire audience discussion.

Once you have identified your speakers, invite them in writing, outlining what you want them to talk about and for how long and when and where they are to present. Also ask if they have special requirements – eg a data projector or whiteboard.

If you have a draft programme prepared, send them a copy so they can see where they fit in overall.

As the conference approaches, double check that your speakers are still available.

Develop a fall-back plan if one of your speakers is taken ill, misses a plane or is otherwise prevented from arriving.

Develop a programme

Most conferences have a similar programme: Official opening by a VIP, then welcome by the host group's leader, then keynote speaker, then workshops or presentations interspersed by tea breaks and meals.

A few planning principles:

- Keep the welcome and VIP speeches as brief as possible – no more than five minutes each.
- Put the keynote speaker on early, before the first lunch if possible
- Don't let any single speaker talk for more than an hour without audience participation. At the time you are confirming bookings with speakers, ensure they agree with the time limits you have set. Ask if they want to take questions during or after their presentation.
- Try to orchestrate your programme so that set speeches are followed by a lively Q&As or workshops.
- Delegates tend to doze after lunch. Wake them up with something energetic, colourful or a tad noisy.
- Try to work in one or two 10-minute spots between longer sessions. Short, punchy presentations add variety and sparkle.
- Provide 20- to 30-minute breaks for morning/afternoon tea and one-hour or longer lunches. Meals allow people to chat and network.
- Encourage input from the audience wherever possible but ask questioners to stand when they ask a question. Standing makes getting a roving microphone to them easier.
- The chair must over-ride questioners who stand and say "I don't need a microphone." They do.
- Have different people chair different sessions. (See hints for session chairs)
- Assign someone to the front row to alert the session chair if a speaker is going overtime. Have a gong/bell ready to ring.
- Plan a session ahead of time in case a presenter is unable to go on. This could be a general summary of sessions to date led by the chair. If previous speakers are still available form them into a panel and ask their reactions.

- If you have to incorporate a business session which outside visitors will find boring - an AGM for example - put it on either early morning or late afternoon. The last session before the conference dinner is a good time – people not involved in the AGM can network informally over drinks while the AGM people know they must finish by a certain time.
- Allow three or four minutes for housekeeping announcements each day - perhaps immediately before morning tea and last thing in the afternoon.

Social activities

Conferences which draw delegates from interstate or overseas usually include some set social activities, both for delegates and/or their partners. Activities include bus and boat trips, guided walks, city tours and informal dinners.

Just remember that too many such activities, while popular, can be distracting and tend to blunt the conference focus.

One way of satisfying most needs is to plan a shorter formal conference with tourist activities available before and after. Ensure you give delegates plenty of info beforehand on local attractions, tourist drives, sporting facilities and restaurants.

(For example, the 2007 U3A conference in Lismore attracted some 200 delegates, many of whom travelled long distances. The only major social event was a conference dinner open to all.

(However, every delegate received up-to-date tourist information including dining out suggestions in their information pack, left on each seat of the opening session.)

Entertainment

Entertainment is usually best restricted to either concerts or as a part of the conference dinner. Schedule acts between courses so your entertainers or after-dinner speakers don't have to compete with the clinking of cutlery.

Billets

Decide early if you are going to take billeting requests, usually on a first-come first-served basis. Billeting offers a wonderful opportunity to get to know visitors but it also comes with its own risks and responsibilities

The organising committee may offer to billet visiting VIPs but what about other delegates? Do you have sufficient volunteers to offer them accommodation as well? Do you really want to? Decide early.

Publicity and marketing

No one will come to your event unless they know about it and are excited by its promise.

So what do you do? Start by reviewing your aims (see earlier). That review will tell you who your main target audience is. Then list reasons why that audience should attend the conference

Can you think of any additional reasons? Examples: Conference being held in a popular tourist destination – attractive time of the year to visit - opportunity to meet leaders in the field.

(For the 2007 U3A conference, the organisers arranged a concurrent art exhibition for members of all 11 North Coast U3As. The show attracted more than 100 works from 58 artists plus hundreds of visitors, valuable media coverage and built goodwill towards older people in the community.

(The organisers also created a 40+ slide show showing members enjoying varied U3A classes and activities. The show ran continuously when the gallery was open and was also intended to be shown on a laptop in the conference information area.)

Once you have your selling proposition devised you have a viable marketing brief.

Survey media outlets

Consider how you will spread your message. Survey your organisation's members to find out what papers they read and what radio stations they listen to. Results will vary according to the age and education of members.

For example, unofficial surveys indicate that most members of U3As prefer ABC local radio and free newspapers over commercial media.

Once you have determined which media outlets your audience prefers, direct your main publicity efforts to those papers and stations.

Some ways to spread your message

- Produce an invitation brochure/registration form to post to prospective delegates. It should include the draft programme and perhaps a few words about your main speaker/s. Give the full street address of all venues and email and phone contacts for inquiries
- Deliver media releases to local newspapers
- Send releases to radio and TV stations. Note: As a result of aggregation, increasingly TV stations don't have the resources to cover local events.
- Send releases to other interested groups. For example, for the 2007 U3A conference, the host U3A mailed personalised draft stories to the editors of other U3As' newsletters.
- Design your own cardboard holder to hold a stack of your promotional literature. These compact info kits can be left on tables/counters/wherever at meetings of other interested organisations, libraries and similar information sources.
- Contact professional or commercial leaders interested in your audience. For example, a U3A could ask health care professionals to attend a conference as observers
- Use the Web. Post all your conference marketing material on your Web site if you have one, including downloadable brochure and registration form in PDF format.

- Email conference details to anyone you think would be interested (it costs nothing)
- Develop a conference marketing kit.

For example, the 2007 U3A conference organisers posted a large envelope of information to the Secretaries all NSW U3As and major U3As in other States.

It contained a programme guide, details of conference fees, a tourist guidebook, a map marked with the venue, other tourist info, a draft press release, a summary of the main motels, hotels and caravan parks and their fees, and conference organiser's names, phone numbers and email addresses.

Badges and kits

Delegates need an easily read name badge. Experience shows that for non-business events a large swing badge with the delegate's first name printed at least twice as large as their surname works best (see photo).

Women do not like badges with pins that damage their clothing.

Use a bold, serif font. Remember older people need high contrast signs – black lettering on a white or buff paper is best (and cheaper to print)

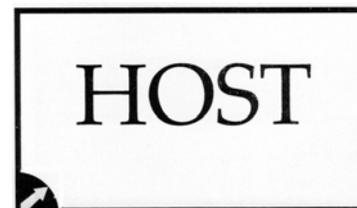
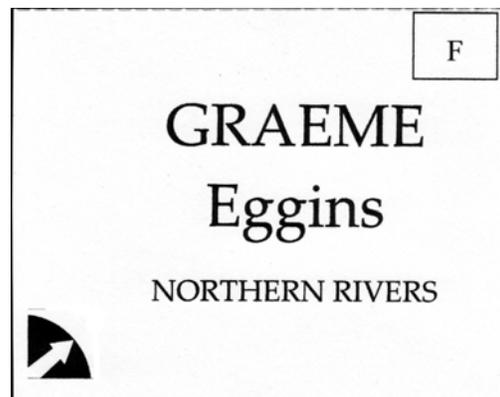
You can also include the delegate's affiliation and, if it applies, a letter or symbol showing that the wearer is registered to attend all or only some sessions of the conference.

If required, small badges printed in black on bright yellow paper can be used to identify committee members.

These HOST badges – see right – mean visitors know who to ask for help.

Give HOST badges only to people who are fully briefed on the conference organisation.

Alternatively print name badges on different coloured papers – yellow for hosts, pink for delegates, blue for presenters etc.



Delegate pack

People attending even a non-profit conference expect to get some type of pack. The photo below shows the pack given out at the 2007 U3A conference.

It consisted of a strong brown carrier bag (free from the local tourist authority) marked with a conference sticker (designed and printed at home by the organisers).



Contents included a pen, various conference papers, a summary of who was attending, brief biographies of the speakers, a magnet, a mini map and a sample of local produce (in this case either a health bar or herbal shampoo).

The pens, maps, samples and so on were all free from local companies. Such items add value but usually mean a committee member has to spend a lot of time asking for donations.

Equipment needs

All conferences need a large screen (2.4 m wide if possible), a data and/or slide projector, a current model laptop loaded with current programmes including PowerPoint and MS Word, a lectern, and most importantly, a reliable sound system.

Good audio is essential, specially for older audiences. (The 2007 U3A conference used the venue's own built-in system but supplemented it with two mobile PAs as backups).

One – preferably two – roving microphones are a must if you expect lots of audience participation.

Try to have at least one technical person on hand throughout to assist speakers set up their gear and to cope with inevitable system failures.

(At the 2007 U3A conference two AV experts also recorded the proceedings as MP3 files).

Catering

Poor catering can literally leave a bad taste in a delegate's mouth. If you consider saving money by asking your own members to provide the food, you run the risk of offering an inappropriate mix of sweets and savouries.

Usually you are wise to employ professionals. You can budget for the extra cost and be sure that everyone will get enough to eat.

Fresh-cut sandwiches with fruit and cheese platters are often more popular than warmed over, greasy finger food. (Incidentally, research shows women eat one and a half sandwiches for lunch, men two).

Avoid “dead things on sticks” or beetroot which can result in floor litter and clothing stains.

You may need to cater for people who are vegetarians, have specific allergies (e.g. nuts) or other dietary needs. If you offer gluten-free sandwiches and biscuits put up a sign saying “RESERVED FOR COELIACS” otherwise others will eat them.

Provide sufficient tea/coffee points to ensure delegates don’t have to wait longer than a couple of minutes. The venue management will help you but, as a rule of thumb, provide one tea/coffee point for each 60 delegates.

Offer a selection of herbal teabags for peoples who don’t drink tea or coffee.

A few hints on how to be a session chair

Conference sessions may be chaired by different people. The notes are designed for people without a lot of previous experience as a host or MC.

Beforehand

- Find out if the session chair is responsible for checking the room set-up and any equipment required
- If something goes wrong with lights/sound etc who should the chair contact? Is someone else designated to be ready to run off and find solutions while the chair stays and stabilises the session?
- Usually the chair meets the speaker beforehand for introductions and to remind her/him how long they have to speak and answer questions
- Make sure the speaker/s have everything they need at hand (technology connections, water, etc)

At the beginning of the session

- Welcome the participants to the session and set the context (what the session is designed to achieve; how it fits with the conference program; what the format will be, e.g. length of presentation, questions during or at the end, will there be roving microphones for questioners to use)
- Welcome the speaker and give a brief biography

Managing session timing and flow

- Place a reliable person in a prominent position such as the front row to cue the speaker five minutes before time is up and then at one minute so they can wrap up their presentation.
- Coordinate the questions (this task this may be taken over by the speaker)

- Ensure that questions from the floor are heard by everyone. If the acoustics are bad, ask the speaker to repeat the question before answering it.
- Plant people in the audience primed with several questions to set the ball rolling or to re-start questions if delegates suddenly go quiet.
- Be ready to intervene if questioners get carried away with their own rhetoric and speak for too long.

Wrap up the session

- Allow enough time for chair to summarise the main points (say one minute max)
- Thank the speaker, possibly present a gift
- Let delegates know what they do next (coffee break / next sessions in 5 minutes/ etc) and give them some time cues to get them moving on.

How to cope with complaints, stuff ups and similar annoyances

No matter how well you planned, something will go wrong on the day.

If it is equipment that fails, be prepared by having good technical people on hand **at all times** and by having back-ups ready.

Allow sufficient time for speakers to set up and check that their equipment works with yours.

Before you send out any written material, ask someone not connected with the conference to check that the message is clear and not capable of being misunderstood. A map marked with the venue/s is a good idea.

If venues or speakers change, distribute an **updated programme** to all prospective delegates. If possible, follow up with reminder emails or phone calls.

Some problems arise during the conference because delegates didn't hear/see/notice an announcement of change. Counter by setting up a whiteboard in a central position (near the toilets is good) with any late changes or programme alterations clearly marked



Announce such changes on the PA – more than once if you can. Make sure all your helpers are also kept up to date with late changes.

No matter what you do, some people will moan. Try to see the complaint from their point of view, keep your cool and do what you reasonably can to fix the problem.

Oh, and enjoy the conference!

After the conference

- Hold a thank-you lunch for the organising committee. Frankly discuss what was good and bad. List suggestions for improvement or traps to avoid

- Write a post-conference report for the next group, outlining what you did and why as well as suggestions for improvements
- Write personal notes to all supporters thanking them for their help

Attachments

- *Draft letter to speaker*
- *Conference countdown*