



Checklist for Organising PD Events

This Checklist is based on my experience over the last two years in organising PD workshops for HFESA. I find it a helpful reminder of the 100 and 1 things that need doing to make an event happen.

I also see it as a way of clarifying roles when the PD Coordinator is working with your Branch to host an event. Some of the jobs on this list are done by the HFESA Secretariat, eg paying invoices for venues and catering; some are done by the PD Coordinator, eg negotiating speaker fee and costs; others require the input of the PD Representative from the Branch that is hosting the event, eg researching and booking suitable venues.

Exactly 'who does what' will depend on the specific event and will be agreed at the time a Branch decides to host a particular event.

The PD Representative for your Branch, or if their unavailable then another Branch Committee Member, will be asked to attend the PD event on the day. That person receives a complimentary registration.

You are welcome to use this Checklist when planning your own Branch events although some things may be slightly different, such as budget approval.

Please provide comments based on your experiences of using the Checklist so it can be improved on and made more user-friendly in future. Thanks

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Checklist Components:

- 1. Speakers**
- 2. Venue**
- 3. Sponsors, Flyer & Registrations**
- 4. One Week Before the Event**
- 5. On the Day & Follow-up**
- 6. Post-event**

1. **Speakers**

- Decide what topics and/or speakers your Branch wants to host
- Approach potential speakers to determine their contribution to a particular topic, decide target audience and get 'in principle' support to present
- Determine speakers' availability and what dates suit your Branch program
Note: try to avoid school holidays and other major events
- Negotiate speaker fee (incl GST) and costs to be covered by HFESA, including option of speaker sharing risk
- Draw up a budget based on the estimated costs and expected income for HFESA Treasurer approval
- Use the pricing guidelines on the HFESA website to help determine the cost to be charged to Members and non-Members

Once budget approved:

- Confirm date with speaker and gather information to promote the event
- Check speakers' AV requirements and when to have tea breaks etc
- Book speaker's flights and accommodation, and agree reimbursement of taxis and meals, or km's travelled (at 55 cents/km)
- If the speaker is a keynote at another conference, contact the organisation for permission and negotiate contribution to their costs, if necessary
- Obtain speaker's PPT presentation and/or handouts at least 2 weeks before the event
- Ensure PPT appropriately formatted for black and white handouts, and design a colour front page
- Obtain agreement from speaker for presentation to be made available on HFESA website, and get signed copyright permission statement
- Encourage the presenter to contribute to *the Ergonomics Australia* journal

2. Venue

- Research suitable venues and negotiate package
- Look for partners or sponsors who may provide free venue or contribute to catering
- Check:
 - room capacity & layout?
 - what AV facilities are provided?
 - on-site catering provided?
 - space for trade display?
 - good access to venue for sponsors?
 - disabled access?
 - signage to room for late arrivals?
 - directions to venue, map, nearest parking?
- Book venue for agreed date and obtain Event Booking Sheet with agreed costs
- Executive must sign Event Booking Sheet***
- Book catering based on estimated numbers
Note: fruit more popular than cakes, include options for vegetarians and gluten intolerant
- Invoices for venue and catering are sent direct to Secretariat
- Provide an address and contact person for the Secretariat to courier the box of speakers' handouts the week before the event

3. Sponsors & Promoting the Event

- Approach potential sponsors and other professional organisations who may co-host
- Negotiate a package which may include reduced rates for their Members and free registrations
- Invoice sponsors
- Develop a list of local contacts to specifically promote this event to, such as regulatory authorities, government departments, large local organisations, the local universities
- Consider recording the event as MP3 for later podcast on the HFESA website

Flyer & Registration Form

- Design Date Claimer and Flyer for Secretariat to direct e-mail to
 - All HFESA Members
 - Other professional associations supporting event
 - aus_ergo listing
- Secretariat adds event to Calendar on HFESA website
- Consider including in Flyer
 - learning outcomes
 - target audience
 - speaker biography and photo
 - support of other organisations, sponsors and speaker's employer
 - early bird discount rates
- Aim to send out the Date Claimer about 8 weeks prior to the event and the Flyer at least 6 weeks before the event

Registrations

- Registrations are faxed or e-mailed (on-line in future) to the Secretariat
- The Secretariat provides weekly updates on the number of registrations coming in
- The Secretariat sends out a Reminder the day before Early Bird closes

4. One Week Before the Event

- Registrations need to close one week before the event for catering & printing handouts. The Secretariat sends out a Reminder the day before registrations close.
- The Secretariat sends out directions to the venue to all registrants including the speakers
- The Secretariat provides a list of attendees and organisations to the PD Representative attending on the day
- Confirm numbers for catering, including speakers and any free places for sponsors, and double check with Secretariat if there are any special dietary requirements to be catered for

Handouts

- The Secretariat arranges the printing and couriering of the speakers' handouts to the venue, along with HFESA banner, attendance list, name tags, and Feedback Forms.

Speakers

- Confirm all arrangements with the speakers
- Provide speakers with information about the audience
- Buy gift for speaker (if they're not being paid) up to maximum value of \$100

5. *On the Day*

- Get there early to check the venue, set up the AV and put up the HFESA Banner
- Be at the Reception desk to give out name tags and speaker's handouts, and tick off attendees on the list (required for insurance purposes)
- Any registrations on the day, get them to complete a registration form with their credit card details and send it to the Secretariat, **NO** cash on the day
- Liaise with catering and the speaker about timing of tea and lunch breaks
- Introduce speaker, thank sponsors, housekeeping (mobile phones, toilets, emergency exits, non-smoking venue, tea breaks, room temperature)
- Thank speaker at the end, lead question time, ask attendees to complete Feedback Forms including ideas for future events and present the speaker's gift

Follow-Up

- Send the Feedback Forms to the PD Coordinator
PO Box 270, Byron Bay, NSW 2481
- Fax list of attendees to Secretariat, if any additions or 'no shows'
fax: 02 9680 9027
- Return name tags to Secretariat for re-use or keep for Branch to re-use
Include cost of postage on HFESA Expense Claim Form
- Send receipt for speaker's gift (if applicable) to Secretariat with HFESA Expense Claim Form (available from Pauline)
- Prepare short report for Newsletter including any photos from the event
Send to Pauline secretariat@ergonomics.org.au

6. Post-Event (PD Coordinator & Secretariat)

- Prepare financial summary of costs and income
- Provide feedback report on event to PD Committee, Branch Chairs & Board
- Send 'Thank You' to speakers & sponsors and give feedback on the event
- Put article in HFESA Newsletter
- Remove event information from website
- Insert PPT presentation on website
- Send e-mail to members that presentation is available on website