

Checklist for Organising PD Events

This Checklist is based on my experience 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 will be asked to attend the PD event on the day and receives a complimentary registration.

Any feedback on the process is appreciated to improve how we manage events. Thanks

Stroma Lawson

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Checklist Components:

1. **Speakers**
2. **Venue**
3. **Catering**
4. **Sponsors & Promotions**
5. **Flyer & Registration Form**
6. **Handouts & Feedback Forms**
7. **The Week Before**
8. **On the Day**
9. **Post-event by PD Coordinator**

1. *Speakers*

Speaker:

Topic:

Date:

Confirmed with Branch:

Branch Rep on the Day:

Honorarium/fee (incl GST):

Additional costs: economy flights
accommodation & meal allowance
airport transfers or travel (55 c/km)

Agreed to make own bookings; details received:

Send HFESA invoice after event with travel receipts:

Budget approved by Treasurer:

Registration costs:
Use Pricing Guidelines on website

Speaker bio & photo:

AV requirements:

Schedule for event incl tea breaks

Handouts required 2 weeks before event:
Black & white only with colour front page

Material for website post-event:

Confirm all arrangements 1 week before event:
Audience, venue, travel, local contact

2. Venue

Venue:

Functions manager:

Access to building:

Directions to venue & parking:

Room capacity:

Work group/cabaret style set-up, max 5 people per table

Catering provided on-site:

AV included in room hire:

Room signage:

Table for registrations outside room:

Invoice to HFESA – payment due:

HFESA Executive must sign agreement with venue – legal requirement

3. Catering

Quote based on estimated numbers:

Fruit more popular than cakes; finger food easier than knives & forks; include options for vegetarians & gluten intolerant; budget about \$30 - \$35 for full day

Confirm numbers by due date:

Including complimentary registrations & speakers

Any special dietary requirements:

4. Sponsors & Promotions

Sponsor / Co-host:

Providing:

Complimentary registrations:

Other professional associations:

Offered:

Targeted contacts:

Sponsor invoiced:

Payment received:

5. Flyer & Registration Form

Date Claimer:

Send at least 8 weeks before event

Flyer:

Send about 6 weeks before event

E-mail to: HFESA members
Aus_ergo
Other professional associations

On website:

Early-bird closes 3 weeks before event:

Registration closes 1 week before event:

Send reminder 2 days before:

Registrations resulting from event:

6. Handouts & Feedback Forms

Quote from local printer:

Couriered to venue:

Any other handouts:

7. The Week Before

Local Branch person looking after the event needs:

- Contact details of speaker
- Agreed schedule for the day including tea breaks
- Contact details for venue functions manager
- Venue event sheet and catering ordered
- HFESA Banner
- Handouts & Feedback Forms (will be couriered to venue)
- Name tags (Pauline will e-mail for printing onto sticky labels, Branch to buy plastic tags & stick labels on)
- Sign-in sheet of attendees (Pauline will e-mail)

8. *On the Day*

Responsibilities 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 sign-in attendees on the list (required for insurance purposes)
- Introduce speaker, thank sponsors, housekeeping (mobile phones, toilets, emergency exits, non-smoking venue, tea breaks, room temperature)
- Make sure catering arrives when it's supposed to
- Thank speaker at the end, lead question time, remind attendees to complete Feedback Forms including ideas for future events, recycle name tags for next event
- Tidy up room after participants leave
- Fax list of attendees to Pauline, if any additions or 'no shows'
fax: 02 9680 9027
- Return any leftover handouts to Pauline ('no shows' will need a copy sent to them) *include HFESA Expense Claim Form to be reimbursed for cost of postage*
- Send the Feedback Forms to the PD Coordinator
PO Box 270, Byron Bay, NSW 2481
- Prepare short report for HFESA Newsletter including any photos from the event
Send to Pauline secretariat@ergonomics.org.au

9. *Post-Event by PD Coordinator*

Financial summary of income and expenditure:

Feedback report to PD Committee, Branch Chairs & Board Directors:

Thank speakers & sponsors incl feedback on event:

Material on website:

Inform members: