

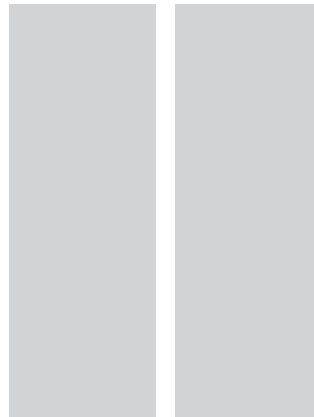


Canadian
Intergovernmental
Conference
Secretariat

Secrétariat
des conférences
intergouvernementales
canadiennes

CONFERENCE PLANNING

Steps to Follow for
a Successful Event



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* Recipient defined as a federal, provincial or territorial government employee that is involved in the planning of a senior-level intergovernmental conference.



This guide outlines the critical organizational and logistical tasks to be performed for a successful and stress-free event.

Advance Planning

6-12
MONTHS
OUT

- Set goals and objectives of the event
- Create a planning team
- Set an event budget
- Pick a date
- Choose a location, a venue, and vendors
- Research speakers/presenters for event

3-6
MONTHS
OUT

- Finalize speakers/presenters
- Identify how conference material and event information will be shared
- Draft an agenda

2
MONTHS
OUT

- Launch registration site
- Translation of conference documents
- Finalize set-up details

1
MONTH
OUT

- Send reminders

1
WEEK
OUT

- Communicate final details

On Location

1
DAY
BEFORE
(SET-UP)

- Pre-conference meeting and walk-through

**DURING
THE EVENT**

- Follow the plan
- Communicate updates
- Adapt as needed

After the Event

**POST-EVENT
(WITHIN
1 MONTH)**

- De-briefs
- Thank you messages
- Financials
- Close file

6-12
MONTHS
OUT

Advance Planning

STEP 1: SET GOALS AND OBJECTIVES OF THE EVENT

- Identify the purpose of the event (the why)

Event goals should be **SMART**



- Identify the strategies and steps you will use to reach your goals



- Request CICS' services via online form:
<http://scics.ca/en/planning-checklist/>

Questions to ask:

1. What do you want to accomplish?
2. Who is your audience?
3. What do you want attendees to take away from the event?
4. Will speakers and panelists be needed to accomplish the goal?
5. How will you specifically measure your success?
6. How many attendees are expected?
7. Will registration have a fee? What will it cost?
8. Where will the event take place? (Province and City)

STEP 2: CREATE A PLANNING TEAM

Conference planning roles and responsibilities are typically shared between the chair or co-chair delegations, the host delegation, the sector secretariat (if applicable) and CICS. Each sector has its own way of working, but a best practice is to clearly identify those responsible for the following main planning elements:

- Registration
- Documentation & Presenters
- Media Availability / Press Conference
- Communique Drafting Committee
- Venue & Accommodations
- Hospitality (food/beverage/social events)

CICS handles many administrative and logistical tasks, such as:

- ▶ Registration tracking and reporting
 - List of delegates
 - Seating plan
- ▶ Translation of conference material
- ▶ Conference room and press conference set-up
 - AV and interpretation
 - Plaques and tent cards
 - Flags



6-12
MONTHS
OUT

STEP 3: SET AN EVENT BUDGET

Things to consider when creating an event budget:

- Room rentals
- Number of days (duration of event)
- Food and beverage (catering)
- Speakers/panelists
- Event signage/branding/décor
- Gifts
- Third party vendors (photographer, transportation, shuttles etc.)
- Staffing
- RCMP, local policing services (if there are security risks/planned protests)
- Social events
- CICS cancellation fees (approximately \$2,000 per conference day if cancelled within 30 days of event)

CICS covers the costs related to:

- AV (including patch fees)
- Set-up of conference room
- Set-up of press conference
- Set-up of CICS Office—including photocopiers, basic office supplies
- Interpretation
- Security guard for main meeting room access
- Translation of conference documents

STEP 4: PICK A DATE

Things to consider when picking a date:

- Availability of Ministers and/or Deputy Ministers
- Availability of CICS
- Related events: complimentary events taking place in the area
- Holiday/Public events/Religious holidays
- Weather (Season)
- Is it an annual event? Do you want the same date? Time of year?

Did you know?

- ▶ Most conferences start mid-week. Wednesday and Thursday are considered prime days of the week.
- ▶ You can view CICS' availability calendar online at www.scics.ca or by contacting us at info@scics.ca.
- ▶ www.doodle.com is a great tool to quickly poll availability of participants.

6-12
MONTHS
OUT

STEP 5: CHOOSE A LOCATION, A VENUE, AND VENDORS

★ Consult the **CICS Venue Checklist** which provides more details on how to choose the right venue for your event

Include CICS

IMPORTANT to include CICS in your search for a venue

- Pick a location for the event
- Determine how many function spaces and room rentals are required
 - Visit room facilities
- Organize accommodations for participants (block of rooms)
- Determine catering requirements
- Finalize venue details
 - Send draft venue contract to CICS for review**
 - Amend as necessary
 - Work with venue to finalize contract
 - **Send copy of final contract to CICS**

CICS CRITERIA

Specifications for Room Rentals

LEVEL OF MEETING	ROOM	DIMENSIONS	CEILING HEIGHT	PROXIMITY
Ministers; DMs	Conference Room	50' x 75'	9'	—
Ministers; DMs	CICS Office	20' x 30'	8'	As close as possible to Conference Room
Ministers	Communiqué Room	20' x 30'	8'	As close as possible to CICS Office
Ministers	Translator Room	6' x 10'	8'	As close as possible to CICS Office
Ministers	Press Conference	30' x 30'	9'	—

* These specifications apply to most meetings served by CICS

Are the main function spaces available at the following times?

1 day prior Set-Up

Rooms required as of 8am, one full day prior to conference start date for set-up

During Conference Days

Access to rooms required on a 24 hour basis

3 hours after Strike

Rooms required for 3 hours after end of meeting for tear-down



6-12
MONTHS
OUT

STEP 6: RESEARCH SPEAKERS/PRESENTERS FOR EVENT

- Refer back to your event goal and objectives to determine the type of speakers/panelists needed
- Use similar events as a reference

Ways to find potential speakers:

1. LinkedIn
2. National Speakers Bureau
3. Speaker Match www.speakersmatch.com.
4. Issue a call for proposal (also known as a call for abstracts).
This gives potential speakers an opportunity to submit their talks
5. Look for certified speakers from organizations
6. Use industry publications, both online and offline
7. Local universities
8. Look to nonprofits in your area
9. Use your own network

STEP 7: FINALIZE SPEAKERS/PRESENTERS

- Send invitation to chosen speakers/presenters
- Once confirmed, send agreement with the event details
- Receive an approved bio and photo of speaker to add to conference material

Things to include in speaker agreement:

- Venue address and room name
- Date & time
- Speech topics
- Speaker fees
- Travel expenses
- Point of contact
- Presentation material including speaking notes deadline (2 weeks in advance of meeting)
- Confirm AV requirements and any special set up needs
(Be sure to relay this information to CICS)

Inform CICS

3-6
MONTHS
OUT

STEP 8: IDENTIFY HOW CONFERENCE MATERIAL AND EVENT INFORMATION WILL BE SHARED

Official conference documents are expected to be made available to participants in both English and French. They are forwarded to conference participants in advance of the meeting, in one of the following ways:

- Option 1:** placed on the CICS secure document website
- Option 2:** by e-mail distribution from the Chair or Co-Chairs
- Option 3:** placed on a secure website created by the Chair or Co-Chair

Things to consider when creating an event website:

- Have a clean website design
- Avoid having too much content on the website
- Key information to include on event website
 - Event name
 - Event date/time & location
 - A clear registration site link
 - Call to action (what do you want your attendees to do?)
- Use engaging images on website
 - This will give attendees a visual representation of what to expect at the event.
- Give a clear description of what the event is about
 - A run-through of all the important elements of the event

STEP 9: DRAFT AN AGENDA

Tips for drafting an agenda:

- Write down a list of all activities (including meals and receptions)
- Put the activities in chronological order
- Set a time for each activity
- Have enough time in between each activity as a buffer for any delays
- Schedule remote video or telephone presentations directly after a break to allow for smooth set-up and transition
- Use item numbers to easily link conference material to agenda topics
- Identify names of presenters and reference title of presentation deck
- Identify locations (names of rooms) where applicable

Importance of the Agenda

- ▶ Provides an understanding of the event
- ▶ Guides the attendees in the logic of the order of topics
- ▶ Reduces waste of time

2
MONTHS
OUT



STEP 10: LAUNCH REGISTRATION SITE

Approve Logistics Information Note drafted by CICS

The Logistics Information Note is sent to all delegations via e-mail (by CICS or the Chair). The note provides high-level information about meeting logistics including instructions on how to register online.

Approve the Registration Form drafted by CICS

CICS is responsible for setting up the registration site for delegates. This includes preparing nametags, the final list of delegates and the seating plan for the main table.

Provide CICS with an e-mail distribution list

Typical approach is to send TO Ministers and/or Deputy Ministers with all senior officials and support staff in CC.

Send Logistics Information Note and launch registration site

CICS to send Logistics Information Note and provide regular updates on list of registrants

STEP 11: TRANSLATION OF CONFERENCE DOCUMENTS

Ask CICS

Send documents and presentations for translation to CICS

- Conference material requiring translation should be sent to CICS as it becomes available in order to allow sufficient time for translation.
- Please note that CICS can only guarantee the translation of documents or presentations received at least **two weeks prior** to the conference.

Did you know?

- ▶ Standard practice for intergovernmental meetings is to provide all official documents, such as agendas and presentations, in both official languages.
- ▶ CICS provides translation services before and during a meeting for official conference material, as required. **Please note this does **not** include lengthy annexes to documents or biographies

2
MONTHS
OUT



STEP 12: FINALIZE SET-UP DETAILS

Ask CICS

Consult the **CICS Build your Meeting Room Set Up Guide** which provides various set-up options.

- Organize logistics call with planning team for complete walk through of agenda and related set-up details
- Finalize arrangements with CICS** and approve set-up plans for:
 - Conference Room
 - Press Conference Room
 - Communique Drafting Room
 - Other (i.e. Bilat Room)

1
MONTH
OUT

STEP 13: SEND REMINDERS

- To your attendees (Via CICS or on your own)
 - Registration and hotel reservation reminders
 - Update on conference material, information on how to access
- To vendors (venue and/or catering)
 - Communicate final details with vendors
 - Confirm services required
 - Confirm date/time and location
 - CICS takes care of coordinating room set-up
- To presenters/speakers/panelists
 - Communicate event details
 - Obtain final versions of presentations, including speaking notes (ensure it is aligned with event goal)
 - Re-confirm AV requirements and any special set up needs **(be sure to relay this information to CICS)**
 - Keep in touch with keynote speakers

Inform CICS

1
WEEK
OUT

STEP 14: COMMUNICATE FINAL DETAILS

- Update venue/caterer with final registration numbers
- Organize logistics call with planning team for final agenda walk through/updates
- Have one point of contact for vendors
- Print all signage required for event



1
DAY
BEFORE
(SET-UP)

On Location

STEP 15: CONDUCT A PRE-CONFERENCE MEETING AND WALK-THROUGH

- Include CICS, venue staff, catering, contacts from host government and/or co-chair governments to discuss the following:
 - Walk the meeting space, noting locations of restrooms, emergency exits and telephones for contacting venue staff
 - Review agenda and all related planning details
 - Confirm main points of contact and roles/responsibilities for duration of event, including best ways to communicate (walkie-talkie, mobile, SMS, e-mail, etc.)
 - Check catering menus; ensure dietary requirements are taken care of
 - Check room set-up again
 - Confirm security requirements/emergency procedures
 - Retrieve keys for rented rooms
 - Ensure all signage is in place

- Meet with CICS to:**
 - Review documents and planned distributions
 - Confirm communique drafting/approval process
 - Participate in a dry-run of all presentations/displays in the conference room

Ask CICS

Take a deep breath, your event will be a great success!

**DURING
THE EVENT**

- Follow the plan
- Communicate updates
- Adapt as needed





**POST-
EVENT
(WITHIN
1 MONTH)**

After the Event

DE-BRIEFS

- Schedule a debrief meeting with the core team of organizers to discuss what went well and areas for improvement
- Prepare a final report with recommendations and ideas for next year

THANK YOU MESSAGES

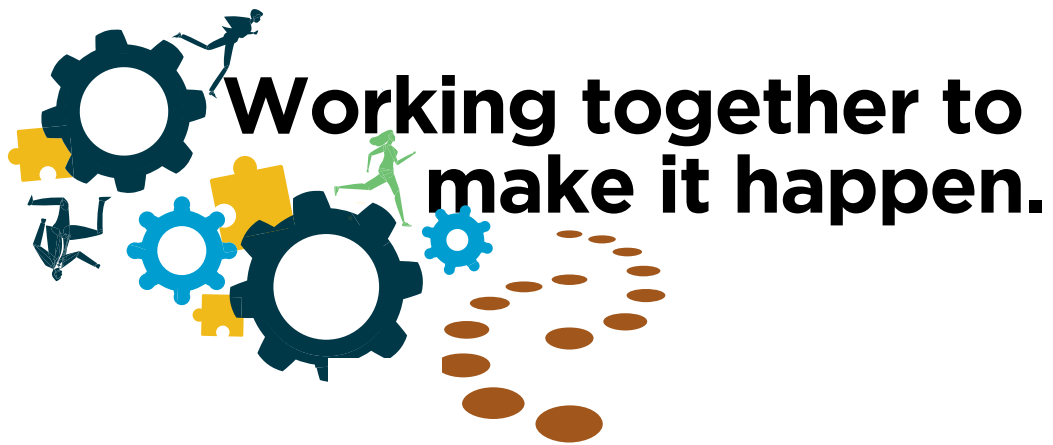
- Sending personalized thank you notes to all that assisted in creating a successful event is a good practice
 - Presenters
 - Staff
 - Vendors

FINANCIALS

- Pay invoices
- Complete comparison of actual versus budgeted costs

CLOSE FILE

- File all materials to assist with planning of future events
 - Actual budget figures
 - Receipts and invoices
 - Catering order
 - Event planning notes
 - De-brief report
 - Photos
 - Schedule of events
 - Final seating plan (provided by CICS)
 - Final List of Delegates (provided by CICS)



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