

### **Policy Redesign Project**

*All policies and procedures are being reviewed as part of this project. This document is pending review, but remains in effect until the review is carried out.*

## **Guidelines for Conference and Event Management**

**Establishment Date:** Deputy Vice-Chancellor (Research), 19 September 2012

**Date Last Amended:**

**Nature of Amendment:**

**Date Last Reviewed:**

**Responsible Officer:** Deputy Vice-Chancellor (Research)

The following guidelines have been established to assist staff who wish to plan a conference and or a major event. In this context, a major event would usually attract outside media attention, involve seeking additional resources from the University, involve a launch, involve outside university participants and may also involve other collaborating partners.

### **Responsibilities of the Event Convenor**

The Conference/event convenor is responsible for ensuring the approval of the event and for expenditure management, including budgets, funding submissions and reconciliations and acquittals, as required, as well as follow-up reporting at the conclusion of the event.

Proposals for the approval of an event that requires significant investment and wide-scale use of University facilities and resources should normally be submitted at least 12 months prior to an international event, at least six months prior to a national event and several months prior to a local event. Consideration should be given to production lead times for printing materials and merchandise should they be required for the event.

### **Branding and Publicity**

Any media activity, marketing, publicity and public relations relating to the conference/event should be conducted in accordance with the requirements of the Office of Communication and Engagement to ensure consistency with University brand, standards and styles. The Conference/event convenor should ensure that the Executive Director, Strategic Marketing and Communications is informed of all relevant aspects of the planning for and conduct of the conference/event.

Where it is intended that the Office of Communication and Engagement contribute to or take responsibility for aspects of the planning and implementation of the conference/event, the conference/event convenor should discuss their requirements and intention with the Executive Director, Strategic Marketing and Communications. If necessary, a business case can then be written that outlines the scope and the benefits for the university together with a budget and KPIs. Once agreed the business case can then be signed off by the relevant Executive Dean or Senior Executive to ensure support and engagement all stakeholders.

## Arranging Faculty Approval and Planning the Conference/Event

Proposals for approval in accordance with clause 3.1 of the [Convening Conference Policy](#) should normally include the following items 1-7/8. The remaining items listed in the table are provided as a guide. The list is not necessarily comprehensive or mandatory and relevant items will depend on the nature of the conference/event. The Office of Communication and Engagement can provide additional detailed advice when required.

	Item	Contact for advice/assistance or relevant policy reference
1	The names of the Conference/Event Convenor/s (Faculty or School initiating and overseeing the event)	
2	The nature of the event, date, time and location, its aims and objectives, intended clientele or target audience and anticipated benefits to the University and to the community.	
3	The names of the conference/event manager(s) and any management committee [staff member(s) or body from within or outside the University who is formally engaged, with the approval of a major cost centre head and the conference/event Convenor, to prepare for and manage the event. This may be a professional event management firm].	Office of Communication and Engagement Purchasing Policy Faculty General Manager
4	Whether it is intended that refereed papers would be presented, and, if so, details of the operation of the refereeing process and arrangements for the publication of conference proceedings, including financing and distribution of profits/losses.	National/international journal
5	The intended participating bodies, organisers and sponsors. <ul style="list-style-type: none"> <li>• nature of University involvement</li> <li>• foreshadowed external sponsorship</li> <li>• foreshadowed VIP visits/involvement (also see 9.5)</li> </ul>	Flinders University Brand Responsibilities (Policy) Office of Communication and Engagement; Head, Development and Alumni Relations

6	A draft budget including any administrative or other University in-kind support (which includes convenor(s) own time). Business Plan if required.	
7	Insurance and risk including a risk assessment  Consider outcomes of similar previous events	Insurance Officer Office of the Vice-President (Corporate Services) Business Manager/Resources Officer Seek the advice of organisers of previous relevant conferences
8	If applicable, details of any requirement for University cash funding or underwriting, including a more detailed budget and business plan showing all projected income and outgoings and distribution of profits/losses <ul style="list-style-type: none"> <li>• costing of all items of expenditure</li> <li>• fees and projected attendance</li> <li>• subsidies or sponsorships</li> <li>• sources of bridging finance, pending receipt of income</li> <li>• how any unanticipated losses are to be covered</li> </ul>	Cost Centre Business Manager/Resources Officer  When considering overall resource requirements and costs seek the advice of organisers of previous relevant conferences
9	A project plan and timelines for all processes leading up to the event	
9.1	Consultation and other professional organisations.	Office of Communication and Engagement Organisers of previous relevant conferences
9.2	Design of the event and the inclusion of organisations to be involved	Organisers of previous relevant conferences
9.3	Engagement of an event manager	Purchasing Policy Policy on Delegation of Authority to Enter into Contracts
9.4	Formation of organising committee, meeting dates, roles of members	
9.5	Selection of invited speakers and participants and the ISSing of invitations, consideration of financial support for speakers Vice-Chancellor to be informed if VIPs such as vice-regal office bearers, Commonwealth or State ministers or members of parliament, local government office-bearers, senior public servants and diplomats are to be invited/involved.	

9.6	Recognition of the event, for example as a designated research conference	Office of Communication and Engagement; Head of Media
9.7	Secure internal and external endorsement/sponsorships	Office of Communication and Engagement; Head, Development and Alumni Relations
9.8	Call for papers/abstracts	
9.9	Publish conference program, obtain and publish abstracts, proceedings	Flinders Press
9.10	Insurance and indemnity (if not through an event manager) including appropriate indemnification of the University and its agents in the event of any financial loss, damage to the University's property, facilities or reputation, or occupational health and safety incidents	Insurance Officer  Executive Officer, Legal and Contracts
9.11	Operational management (if not through an event manager) and assign responsibilities: <ul style="list-style-type: none"> <li>• scheduling</li> <li>• booking of facilities and facilities management;</li> <li>• marketing, publicity and public relations;</li> <li>• administrative support requirements including establishment of accounts, office space, support staff;</li> <li>• registration method, invoice, payment, refunds</li> <li>• technical infrastructure and support (Audio-visual, computer, internet);</li> <li>• registration desk, nametags, satchels</li> <li>• security;</li> <li>• catering;</li> <li>• cleaning;</li> <li>• signage;</li> <li>• equipment hire;</li> <li>• accommodation, parking and transport;</li> <li>• related liaison with relevant parties inside and outside the University and</li> <li>• OH&amp;S and risk management considerations</li> </ul>	Purchasing Policy Cashier Supervisor  Services and Security Office, Parking Office (if University the venue)  Office of Communication and Engagement; Head, News and Media
9.12	Evaluation- feedback forms or email/web-based collection from attendees after event	

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9.13	Financial acquittal and reporting	
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