

# Your Conferencing Playbook

A helpful guide on planning a successful conference or event

We are the University of Cape Town's Conference Management Centre (CMC) – a Professional Conference Organiser (PCO) and part of Commercial Development, which falls under UCT's Finance Department. With over 40 years' collective event management experience located right here on-campus, we can ensure your event is a successful and profitable one.

**Consider this scenario:** Your HOD wants you to organise a conference, possibly an International Association Conference, or a small event for your peers. Are you aware of what venues to consider? How about catering? Have you given any thought to health and safety, or how you're going to collect payments?

This Conferencing Playbook provides guidelines and a checklist when organising your own conference.



## Should you choose a PCO or go it alone?

As a conference convenor, your time should be spent recruiting expert speakers and fine-tuning the programme.

There are a lot of moving parts in a conference, so you need to ask yourself the question: does your department/faculty have the resources (time, staff, expertise) to take this on?

When choosing a PCO, you need to consider a number of factors. Among other things, have they provided a detailed budget,

**NOTE: UCT staff who are organising a conference should consult the CMC, who can provide an initial consultation free of charge.**



### 1. Choose a date

Timing is crucial. You need to allow enough time to source the right venue, speakers and suppliers. Venues can be booked up as far as 12–24 months in advance, so the earlier you book, the better.

Remember that speakers should be notified early on, too, so you can begin finalising the programme.

You should also consider holidays, because the price of flights will be a factor potential delegates consider.



### 2. Choose a venue

Deciding on a venue is not as simple as you may think. Consider: Availability; Price (what's included ... delegates will want to know if the WiFi is free, and where they can park); Location (is there suitable accommodation nearby?); Catering (can they accommodate all dietary requirements?)



### 3. Get your budget together

Whether you are working on your own or have partnered with a PCO, you should ensure that your budget is in place as soon as possible. You need to know what your projected income and expenses are.

The most important advice we can give you when budgeting is this: Do not overestimate delegate numbers, or trade and sponsorship income! Be realistic, and then market your conference with confidence.



### 4. Choose a conference name and theme

Your conference theme and logo should be determined early in your planning, and reflect your target delegate audience.



### 5. Gather your team

Assemble your conferencing team early. Your conference's success rests with you and your support team. Ensure you have the strongest possible team working toward the same goal.

And, brief your PCO in detail about the people in your various committees, and who their point of contact is.



### 6. Plan your programme and choose your speakers

Your speakers will determine to a large degree the success of your conference. The programme is what many of your delegates will look at first. So attract international field experts (where applicable). Recruit local talent, too – this will keep costs down.



### 7. Invite sponsors and trade

Sponsorship and trade packages should be put together, and interested partners contacted, as soon as possible. This invaluable source of income allows you to add 'the wow factor' to your event. If you're working with a PCO, ensure you determine the party responsible for securing these contracts. (Note that not all PCOs are fundraisers.)



### 8. Do something fun

Your delegates have almost certainly been to other conferences. And you want your conference to be memorable. Consider adding unique or fun and quirky activities to your programme.



### 9. Get your finances in order

Conferences are expensive, but they can also be hugely profitable for your research units, departments, faculties or associations. Income is derived from registration fees, sponsorship and trade, from university funding (possibly), or a profit rolled over from a previous conference.

If you're using a PCO, they must indicate exactly what the projected costs are. And make regular budget updates non-negotiable.

In terms of UCT's Procurement Policy you will most likely need to get three quotes before proceeding with a conference. Procurement and Payment Services recommends that you use CMC for one of these quotes



### 10. Get an online presence

Make sure the conference website is always up to date, accessible, and allows delegates to register and pay their registration fees online.

Contact the CMC for a FREE consultation before you begin

conveniently based on-campus



0% mark-up on supplier invoices



vast experience in bid submissions

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