PURPOSE
To provide consistent policies based on previous educational event/conference planning experiences that act as a guide for the Education Committee.

STRUCTURE
The Education Committee Chair or the Education Director chairs the educational event and will be referred to as the Conference Coordinator. In addition to the Conference Coordinator, the following positions/tasks are assigned to individual volunteers, as needed:
- Conference Treasurer
- Conference Secretary
- Registrar
- Site Coordinator
- Exhibits Coordinator
- Speaker Liaison
- Promotion Coordinator
- Moderators
- Room Monitors
- IPAC EO Table representatives

POLICY
1. Major educational events (with exhibitors) are held at least every two years to facilitate the attendance of exhibitors. Smaller events (e.g., workshops) may be held during intervening years.
2. The date and venue are determined at least 6 months prior to major educational events. Exhibitors often need at least 6 months lead time.
3. The IPAC Canada poster theme may be incorporated into the theme of the event.
4. The conference/events flash drive in possession of the Education Director is an archive of previous events and may be used as a reference. It should be updated following the event.
5. A thank-you card and $30 honorarium will be given to speakers who do not request a fee.
6. Sponsorships/donations may be invited. A charitable donation receipt cannot be issued.

PROCEDURE
The responsibilities of each position/task are outlined in Appendix A.

REFERENCES
1. 2.12 Education Director (https://eo.ipac-canada.org/photos/custom/policymanual/2-12%20Education%20Director%202017April.pdf)
2. 5.1 Education Committee (https://eo.ipac-canada.org/photos/custom/policymanual/5-1%20Education%20Committee%202017April.pdf)
APPENDIX A: RESPONSIBILITIES OF PLANNING COMMITTEE – DETAILED LISTING

A. CONFERENCE COORDINATOR

1. Pre-conference
   - Form a planning committee and allocate responsibilities.
   - Determine a theme for the event, if appropriate.
   - Develop a timeline and action plan (see Appendix B for template).
   - Plan and chair planning meetings.
   - Communicate with committee between meetings.
   - Assure process is proceeding as per time line and budget.
   - Assist committee members as necessary.
   - Assure chapter members are informed and encouraged to promote conference.
   - Appoint room monitors, moderators.
   - Prepare thank you notes to give to volunteers.
   - Work with committee to develop contingency plans for: Speakers, Moderators, Committee, postal strike, hotel disaster, excess exhibitors, insufficient registrations etc.

2. Conference Day
   - Greet and thank speakers for their participation.
   - Visit and thank Exhibitors.
   - Assist volunteers as necessary.
   - Distribute thank you notes to committee and volunteers.

3. Post-conference
   - Arrange with Speaker Liaison to send letters of thanks to speakers, including any positive comments from evaluation forms.
   - Review evaluations prior to wrap-up meeting.
   - Prepare a summary report for next chapter meeting.
   - Prepare a summary report for 3M presentation by March 31 of the following year.
   - Chair a wrap-up meeting to go through evaluations, share successes and determine what could be changed next time event is held.
B.  CONFERENCE TREASURER

1.  Pre-conference
   □ Prepare a projected budget (e.g., underestimate revenue, overestimate costs, honoraria for guest speakers, estimated speaker expenses, donations/sponsorships)
   □ Submit budget to chapter treasurer and planning committee for information.
   □ Provide committee members with an Expense Record Form to detail their expenses. All receipts must be kept.
   □ Maintain a detailed list of educational event expenses for the chapter treasurer and update projected budget, as required, with new information.
   □ Each committee member will keep a record (on Expense Record form) with receipts for out of pocket expenses of less than $20.00.
   □ For anticipated expenses greater than $20.00, a budget will be provided by the conference Treasurer to the chapter Treasurer and Executive for approval.
   □ Travel/hotel expenses for volunteers are not covered except in exceptional circumstances as funds are available and as approved by the conference chair/Education Director and chapter Executive. Hotel room will be considered if volunteer is more than 1 hour from the conference venue.

2.  Conference Day
   □ Provide receipts for payment of educational day registration to participants on the day of the educational event (or electronic copies if email address has been provided).

3.  Post-conference
   □ Committee members to submit a completed Expense Record Form with receipts for reimbursement to the conference treasurer at end of event.
   □ Provide chapter Treasurer with final Expense Record Forms and receipts for reimbursement after the event.
   □ Review evaluations prior to wrap-up meeting.
   □ Prepare a final event summary of the true educational event revenue and expenses for the wrap-up meeting, chapter Treasurer and Education Director.

C.  CONFERENCE SECRETARY

□ Record minutes of planning meetings.
□ Assist in development of print materials – pre-event flyer/poster, registration form, event program, evaluation forms etc.
□ Ensure that print materials are electronically distributed.
D. REGISTRAR

1. Pre-conference

☐ Assist registrar at registration table during the event or other tasks as required.

☐ Collect evaluations and summarize comments. Distribute electronically to planning committee prior to wrap-up meeting.

☐ Include the following on the registration form:
  o Specify the date for early registration.
  o Note on registration form that cheque is payable to IPAC Eastern Ontario and MUST accompany the registration (unless PayPal option is included).
  o Note that requests for refunds must be received in writing. Cancellations greater than 3 weeks before educational event will be fully refunded. Cancellations less than 3 weeks before event will receive 50% of the registration fee. Registrations may be transferred at any time without penalty.
  o Note on registration form, "Receipts will be available at the door. Email confirmation will be sent if email address is provided." If using website registration this is not necessary to include, as all registrants will receive electronic confirmation automatically.
  o An option to share registrant’s contact information with exhibitors should be included on registration form.

☐ Keep a detailed record of each cheque/payment, noting date received and date given to treasurer to deposit.

☐ Prepare a list of all delegates for registration desk.

☐ Prepare certificates of attendance for delegates.
Assemble & stuff registration folders & bags (e.g., name tags, receipts, program, speaker bio, exhibitor list, sponsors, evaluation forms)

Provide final registration number to site coordinator (including volunteers, speakers, exhibitors) - to allow for meals, seating in rooms.

2. Conference Day

Provide registration information, nametag and ribbons, as indicated, to delegates, speakers, moderators, exhibitors and hosts.

Provide initial contact for speakers and media, introduce them to Speaker Liaison.

Check off registrant on the master list upon arrival.

Be prepared for walk-in registrations.

Act as an information desk for registrants - be familiar with venue.

Request assistance from room monitors as necessary.

3. Post-conference

Forward funds from walk-in registrations to the event treasurer at the end of the day.

Review evaluations prior to wrap-up meeting.

Provide a summary report with total number of attendees by type (e.g., delegate, speaker, exhibitor, volunteer, etc.) for the wrap-up meeting and education director.

E. SITE COORDINATOR

1. Pre-conference

Book preferred date with chosen event venue representative.

Arrange a time for planning committee to view site and meet venue representative.

Negotiate a contract for meeting room(s), AV equipment (some equipment may be included in room rental), meals, refreshments.

Determine deposit requested to hold venue booking and communicate amount with conference treasurer for follow up and payment by chapter treasurer.

Act as ongoing contact for communications with selected site, including:

- availability of additional meeting rooms, if needed
- details of seating and table set-up (e.g., provision of extra chairs along back wall for volunteers/speakers)
- if exhibits and presentations are in the same room, limit the opening between rooms to 8 feet
hotel rooms – arrange for a block of 40 rooms to be held until 2 weeks prior to event for events lasting >2 days

- confirm earliest set-up time for registration (preferably evening before event) and communicate this to Registrar

- confirm earliest set-up time for exhibitors and communicate this to Exhibits Coordinator

- check photocopier availability and cost

- confirm final list of AV equipment required

- attend to specifics of catering, including special meal requirements (allergies, vegetarian, gluten sensitivity, etc.)

- identify person responsible for AV equipment and method of locating (provide copy of program so that he can check levels for each speaker),

- identify person responsible for problems with the venue (e.g., temperature) and catering and determine how they may be reached during the event

- determine if cell phones and internet work inside facility

- determine location of washrooms, telephones, cloakroom etc.

- Confirm with site final numbers for catering 3 business days prior to event.

- Finalize meal and refreshment menus.

- Oversee set-up of delegate seating and assist Exhibits Coordinator with exhibit table set-up.

- Ensure space for IPAC EO table in order to promote IPAC Canada and Chapter membership to educational event participants.

- Ensure space for Cameroon artifacts/information table, if requested by Cameroon Twinning Project Chair.

2. Conference

- Oversee Room Monitors and orient them to conference site and duties.

- Check room set-up, room temperature before start of day.

- Ensure that event is progressing smoothly.

- Assist others as required.

- Approve any changes to refreshments/meals.

- Review financial statement for the day with site contact person (may not be available until post-conference), and communicate information to conference treasurer for follow-up and payment by chapter treasurer.
F. EXHIBITS COORDINATOR

1. Pre-conference

- Have chapter members collect business cards from company reps interested in exhibiting at next conference. Pass cards on to Conference Chair.
- Determine fee for exhibit table with Planning Committee:
  - Established exhibit fee includes registration for 2 representatives.
  - Additional representatives will be charged a fee to cover refreshments/expenses.
  - There will be no discount for un-manned tables.
  - Gifts and/or donations in lieu of exhibit fee are not permitted.
- Send invitation letter #1 to possible exhibitors/sponsors before new budget year. (December of previous year).
- Include the following information on the Exhibitor Registration Form:
  - Invitation to sponsor a speaker. Sponsors will be acknowledged at the event and in the final program if sponsorship is received before printing.
  - Companies will be sent an email confirmation that their registration has been received.
  - Once spaces are filled, companies wishing to exhibit will be informed that they are on a waiting list, pending a cancellation.
  - Cancellation by Exhibitor:
    - Greater than 30 days before - refund minus $50.
    - Within 30 days payment forfeited unless space can be rented to another vendor. In that event a refund will be made minus $50.
    - Failure to occupy space: no refund.
  - Registration at the door is not available unless all spaces were not filled in pre-registration.
- Send confirmation letter #2 and Exhibitor Registration Form to responders.
Make a plan of exhibit hall with 3x8 tables - assign a number to each table.

Assign exhibitors on the master plan based on their need for electricity and to avoid competing vendors being next to one another, as possible.

Continue to encourage exhibitor participation until all spaces are filled, especially companies whose products relate to the conference topics.

Keep a waiting list in case of cancellations.

Maintain a record of who has been invited, who has responded, and to whom registration form has been sent.

Maintain a record of registrations received.

Prepare an on-site memo: welcome, contact person, quiet during sessions and dismantling, evaluation form.

Ensure that there is at least 2.5 hours of exhibit time per day allotted in the event program.

If door prizes are provided by exhibitors, include in the event program, “use of ...as a door prize does not constitute endorsement by IPAC EO”.

2. Conference Day

Assign and label exhibit space for each exhibitor.

Provide IPAC Canada corporate members with sign for table.

Liaise with each exhibitor during the day - request the completion of an evaluation form.

Monitor for noise during presentations and address as necessary.

Collect evaluation forms from exhibitors.

3. Post-conference

Provide exhibitors with a list of registrants who are willing to share their contact information, post conference.

Collate exhibitor evaluation form comments and distribute electronically to planning committee prior to wrap-up meeting.

Send out thank-you notes to exhibitors.

Prepare a summary for the wrap-up meeting that includes evaluation of the event process and personal recommendations.
G. SPEAKER LIAISON

1. Pre-conference

☐ Work with education committee, including conference treasurer, to produce a budget for honoraria for speakers.

☐ Work with education committee to design program and identify potential speakers.

☐ Make initial exploratory contact with potential speakers recommended by the committee:
  o Identify speaker’s interest/availability and whether a fee and/or expenses are required.
  o Inform re: Goals and objectives /theme of the conference, target audience - mix- knowledge level, etc.
  o Get speaker’s views on the proposed topic/theme or have them identify a topic.
  o Inform potential speakers that you will confirm their participation once approved by the committee.

☐ An industry speaker is acceptable if unbiased and a credible speaker.

☐ Offers to sponsor a speaker must be approved by the speaker.

☐ Follow-up with potential speakers - confirm participation or not.

☐ Confirmed speakers – send confirmation letter that includes:
  o Details about the venue/location, date, program objectives, audience, time, duration and title of their presentation, and what we would like to see included.
  o Reminder about the request for an electronic copy of handout to be sent prior to event.
  o Details about speaker’s presentation:
    ▪ Request ideas for an interesting title
    ▪ Identify main points you would like speaker to make
    ▪ Discuss length of presentation/question period
    ▪ Relationship of the assigned topic to the other topics
    ▪ Scope of assigned topic
    ▪ Suggested learning objectives, if known
  o Request for completion of a Speaker Data Sheet
  o Invitation to attend the entire event at no charge (including meals, refreshments).
  o Invitation to attend any social functions at no charge.
Information about hotel reservation, if required. Request check in at Registration Desk.

Enclose:

- Speaker Expense Claim Form
- Copy of event program
- Info sheet about IPAC EO if not included in letter or previous letter.

Assist with travel arrangements, if required.

- Assign someone to greet speaker at train station/airport, as applicable.
- Reserve hotel rooms as required - notify Site Coordinator/Chair.
- Phone or email speaker 6 weeks before event to confirm travel arrangements.

Consider contingency plans for speaker(s) unable to show. (e.g., have a Chapter member prepared to speak if needed; free registration to “be available” or registration refunded?)

Collate a Speaker Contact list - provide copy to Chair and Registrar.

From speaker profile provided, prepare a speaker introduction for Moderator to use.

Handouts - promote obtaining these by 2 weeks before the day so that copies can be made and placed in Registration package; provide handouts to Registrar as soon as they come in.

Prepare thank-you cards and honorarium and give to moderator.

2. Conference Day

- Oversee Moderators and orient them to their role.
- Greet speakers as they arrive and orient them to the hotel facilities etc.
- Assure speaker has obtained information and nametag / speaker Ribbon from registration desk.
- Provide Moderators with prepared introductions.
- Introduce speaker to Moderator.
- Present honorarium or gift in private or Moderator to present after presentation.

3. Post-conference

- Review evaluations prior to wrap-up meeting.
- Prepare a summary for the wrap-up meeting that includes evaluation of the event process and personal recommendations.
- Arrange with conference Chair to send letters of thanks, including any positive comments from evaluation forms.
H. PROMOTION COORDINATOR

Pre-conference

☐ Provide conference/event information to IPAC Canada for inclusion in calendar of events.

☐ Design a simple poster / Save the Date flyer that can be sent electronically and be posted on the chapter website.

☐ In conjunction with Conference Secretary, electronically share an early information message with Save The Date flyer attachment with chapter members & local health care settings as well as neighbouring chapters.

☐ Design registration form / brochure in conjunction with the planning committee and have this posted on the website and distributed electronically.

☐ Design conference/event program in conjunction with the planning committee.

☐ Provide printed copies of final program for registration packages.

OTHER RESPONSIBILITIES - VOLUNTEERS

MODERATORS:

1. Liaise with the Speaker Liaison.
2. Arrive at least 15 minutes before the session being moderated.
3. Review prepared introduction.
4. Obtain Time Cards from Speaker Liaison.
5. Meet speaker prior to the session and accompany him/her to seat or podium.
6. Show speaker the time cards and explain their use.
7. Make general announcements as necessary before start of session.
8. Introduce speaker with prepared introduction.
10. Field questions from the audience. Have one or two questions prepared in advance.
11. Thank speaker and present thank-you card/gift.
12. Remind delegates to complete evaluation forms.
13. At break times, promote visiting exhibits.
14. At end of day, inform where to leave completed evaluation forms and nametags when departing.

**ROOM MONITORS:**

1. Liaise with Site Coordinator.
2. Arrive in time to become familiar with the facility prior to the majority of delegates arriving.
3. Check that water is available for speakers and audience.
4. Know location of: washrooms, telephones, cloakroom, etc.
5. Monitor doorway between Exhibit Hall & Conference Room, welcome delegates & check for nametag.
6. Check seating: assure that tables are full. Chairs at back are reserved for committee, speakers, exhibitors and perhaps excess delegates.
7. During sessions assess the room for the following:
   a) Temperature
   b) Noise level (especially from exhibit area or kitchen)
   c) Appropriate lighting
   d) Ability to hear speaker when session is in progress
8. Notify Site Coordinator for AV equipment deficiencies.
9. Assist in the distribution of handout material if necessary.

**IPAC EASTERN ONTARIO TABLE:**

1. Promote IPAC Canada and IPAC EO to registrants.
2. Provide membership applications.
### TIMELINE - IPAC EASTERN ONTARIO CONFERENCE/EVENT PLANNING COMMITTEE

**DATES & DEADLINES** (not all inclusive)

<table>
<thead>
<tr>
<th>ITEM/ACTION</th>
<th>MRP</th>
<th>Deadline</th>
<th>Actual</th>
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<tbody>
<tr>
<td><strong>Conference/Event Chair</strong> - MRP: _________________________________</td>
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<tr>
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<td>4. Plan and chair planning meetings</td>
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<td>5. Appoint room monitors</td>
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<td>6. Prepare and distribute thank-you notes for committee members &amp; volunteers</td>
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<td><strong>Conference Treasurer</strong> - MRP: _________________________________</td>
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<td>1. Prepare a projected budget for the event and submit to chapter treasurer and planning committee</td>
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<td>2. Provide committee members with an Expense Record Form to detail their expenses</td>
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<td>3. Maintain a detailed list of event expenses for the chapter treasurer</td>
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<td>Conference Secretary - MRP: _________________________________</td>
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<td>1. Record minutes of planning meetings</td>
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<td>2. Assist in development of print materials – pre-event flyer/poster, registration form, event program, evaluation forms etc.</td>
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<td>3. Ensure that print materials are electronically distributed</td>
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<td>4. Assist registrar at registration table during the event or other tasks as required</td>
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<td>5. Collect evaluations and nametags as people leave</td>
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<td>6. Summarize comments on evaluation forms</td>
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<td>7. Distribute evaluation summary electronically to planning committee prior to wrap-up meeting</td>
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<td>Registrar - MRP: ____________________________</td>
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<td>1. Determine early registration deadline. Consider incentives to register early</td>
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<td>2. Determine registration fee</td>
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<td>3. Consider using PayPal for registration payment through website</td>
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<td>4. Determine who receives complimentary registration</td>
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<td>5. Determine refund protocol</td>
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<td>6. Set up electronic registration procedure (e.g., through website, Eventbrite)</td>
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<td>13. Act as initial contact for speakers and media, introduce them to Speaker Liaison.</td>
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<td>14. Check off delegates on the master list upon arrival</td>
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<td>15. Be prepared for walk-in registrations</td>
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<td>16. Act as an information desk for delegates</td>
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<td>18. Provide a summary report with total number of attendees by type</td>
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**Speaker Liaison - MRP: ____________________________**

1. Determine honoraria for speakers
2. Identify potential speakers & contact regarding availability
3. Confirmation letter to speakers
4. Expense claim form to speakers
5. Develop speaker contingency plan for no-shows
6. Obtain speaker presentations, bios & handouts
7. Assist speakers with travel arrangements, if required
8. Arrange for items required by speakers (e.g., clickers, internet)
9. Send presentations/handouts to webmaster for website
10. Load presentations on memory stick & presentation laptop
11. Provide speaker bios for program & Moderators
12. Prepare honoraria and thank-you cards to present to speakers following presentation
13. Prepare speaker introductions for Moderators using speaker bio
14. Time card sign - prepare for use by Moderator
15. Prepare thank-you cards for Moderators
16. Greet speakers as they arrive, introduce to Moderator of session
17. Arrange with conference Chair to send letters of thanks, including any positive comments from evaluation forms
18. Prepare a summary for the wrap-up meeting

**Site Coordinator - MRP: ____________________________**

1. Negotiate a contract for meeting room(s), AV equipment (some equipment may be included in room rental), meals, refreshments
2. Confirm venue and date
3. Determine deposit requested to hold venue booking and communicate amount with Conference Treasurer
4. Confirm date for final numbers to site for meals and setup
5. Confirm times of meals and send to secretary for program
6. Finalize the menu
# CHAPTER EDUCATIONAL EVENTS

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<th>ITEM/ACTION</th>
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<td>7. Attend to specifics of catering, including special meal requirements (allergies, vegetarian, gluten sensitivity, etc.)</td>
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<td>8. Confirm room setup (e.g., extra tables if required)</td>
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<td>9. Determine signage required and communicate to Conference Secretary</td>
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<td>10. Confirm earliest setup time and communicate to Registrar and Exhibits Coordinator</td>
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<td>11. Identify person responsible for AV equipment and method of locating</td>
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<td>12. Identify person responsible for problems with the venue</td>
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<tr>
<td>13. Orient Room Monitors to their role</td>
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<tr>
<td>14. Send letter of thanks, including any comments, to venue contact person</td>
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<tr>
<td>15. Prepare a summary for the wrap-up meeting</td>
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### Exhibits Coordinator - MRP:

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<tr>
<th>ITEM/ACTION</th>
<th>MRP</th>
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<tbody>
<tr>
<td>1. Determine exhibitor fee</td>
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<td>2. Actively seek out industry participation</td>
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<td>3. Confirm tables requested for displays: IPAC EO, Cameroon Twinning Project</td>
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<td>4. Send invitation letter #1 to possible exhibitors/sponsors before new budget year (December of previous year)</td>
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<td>5. Send confirmation letter #2 and Exhibitor Registration Form to responders</td>
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<td>6. Request materials for bags from sponsors</td>
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<td>7. Prepare list of sponsors for program, signs and nametags</td>
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<td>8. Send confirmation letter with setup instructions to exhibitors</td>
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<td>9. Prepare exhibit room map</td>
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<tr>
<td>10. Prepare information memo and evaluation form for exhibitors</td>
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<tr>
<td>11. Assign and label exhibit space for each exhibitor</td>
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<td>12. Provide IPAC Canada corporate members with sign for table</td>
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<td>13. Greet exhibitors and liaise with each exhibitor during the day</td>
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<td>14. Monitor for noise during presentations and address as necessary</td>
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<td>15. Collect evaluation forms from exhibitors</td>
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<td>16. Provide exhibitors with a list of delegates who are willing to share their contact information, post-conference</td>
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<td>17. Collate exhibitor evaluation form comments and distribute electronically to planning committee prior to wrap-up meeting</td>
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<td>18. Send out thank-you notes to exhibitors</td>
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<tr>
<td>19. Prepare a summary for the wrap-up meeting</td>
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**Promotion Coordinator - MRP:**

1. Conference Info on IPAC EO Website & IPAC Canada website
2. Design a simple poster / Save the Date flyer that can be sent electronically
3. Email message with Save The Date flyer attachment to members & institutions
4. Registration form / brochure ready on website and emailed out
5. Conference Program - draft for review
6. Conference program - print final copy

**Moderators**

1. Liaise with the Speaker Liaison
2. Arrive at least 15 minutes before the session being moderated
3. Review prepared introduction
4. Obtain Time Cards from Speaker Liaison
5. Meet speaker prior to the session and accompany him/her to seat or podium
6. Show speaker the time cards and explain their use
7. Make general announcements as necessary before start of session
8. Introduce speaker with prepared introduction
9. Maintain strict timelines, using time cards
10. Field questions from the audience. Have one or two questions prepared in advance
11. Thank speaker and present thank-you card/gift
12. Remind delegates to complete evaluation forms
13. At break times, promote visiting exhibits
14. At end of day, inform where to leave completed evaluation forms and nametags when departing

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Page 17
### Room Monitors

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<tr>
<th>ITEM/ACTION</th>
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<tbody>
<tr>
<td>1. Liaise with Site Coordinator</td>
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<td>2. Arrive in time to become familiar with the facility prior to the majority of delegates arriving</td>
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<td>3. Check that water is available for speakers and audience</td>
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<td>4. Know location of: washrooms, telephones, cloakroom, etc.</td>
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<td>5. Welcome delegates &amp; check for nametag</td>
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<td>6. Check seating: assure that tables are full. Chairs at back are reserved for committee, speakers, exhibitors and perhaps excess delegates</td>
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<td>7. During sessions assess the room for the following:</td>
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<td>a) Temperature</td>
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<td>b) Noise level (especially from exhibit area or kitchen)</td>
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<td>c) Appropriate lighting</td>
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<td>d) Ability to hear speaker when session is in progress</td>
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<td>8. Notify Site Coordinator for AV equipment deficiencies</td>
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<td>9. Assist in the distribution of handout material if necessary</td>
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### Chapter Display Tables [e.g., IPAC EO, Cameroon Project] and Miscellaneous - MRP: ________________

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<tbody>
<tr>
<td>1. Arrange to borrow a display board</td>
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<td>2. Prepare information for the display board.</td>
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