

## DEPARTMENT CONFERENCE PLANNING TOOL KIT

### **Purpose:**

To provide instructive guidance and tools to departments planning a conference that is not directly supported by CAS-Events and/or CAS-Marketing. This document can not only guide event planning but serve as a task completion checklist. Supporting resource documents are accessible here: <https://usf.box.com/s/z35qdu3ln14h7a1g95lmjrhlc22l8hj6>

**Timeline:** Please note these are suggested time frames and may vary based on circumstances.

### **9-12+ Months**

- Determine Event Date
  - Establish alternative date
- Clarify Conference purpose
- Clarify Conference benefit to USF
- Engage supporters
  - Community
  - Graduate and Undergraduate student groups
  - Other USF departments
- Consider Conference Format
  - Live/In-person
  - Virtual
    - for more information, see virtual event tool kit: <https://usf.app.box.com/file/750755360463>
    - Teams Meeting
    - Teams Live Event
- Create Budget/Secure Funding – See attached template for use
  - What are the sources of funds?
    - National Organization
    - Grants – See attached Grant Information
    - Participant fees
    - Donations
    - USF department support
  - What are the costs?
    - Live/In Person
      - Speaker Honorarium
        - Note: USF policy limits the amount spent on and style of travel and hotel accommodations. For the flexibility to allow the speaker to travel and secure accommodations as he/she chooses, negotiate an increased honorarium that covers these expenses paid directly by the speaker.
    - Travel
      - Speaker travel
      - Ground transportation

- Venue
  - Audio Visual (A/V)
  - Food and Beverage
  - Parking
  - Marketing/Promotion
  - Décor
  - SWAG
- Virtual – Virtual events eliminate many of the costs listed above making funds available for (highlighted items will remain):
  - Production company – consider using a production company to deliver a professionally produced event
  - Delivered food/treats/SWAG
- If your costs exceed available funding, what are your options?
  - Additional sources of funds
  - Ways to reduce expenses
- Attendance
  - Number and composition
    - Faculty: USF/other Universities
    - Staff: USF/ other Universities
    - Students: USF/ other Universities
    - Community Members: Local/travelers
    - VIPs
    - Do any of your guest have special needs?
  - How does the number and composition of attendance affect the budget?
- Consider agenda items that impact budget, decisions, flow of the day
  - Number of speakers
  - Number of general and breakout sessions
  - Registration/check-in
  - General/breakout sessions
  - Meals/receptions
- Reserve Venue
  - General Session (large group) Space:
    - Capacity needed
    - Types of activity occurring in this space
    - Room set ups based on those activities
    - A/V needed
  - Breakout Session (number of small group sessions) Space:
    - Number needed and capacity of each
    - Room set ups
    - A/V needed
  - Options
    - On Campus

- Alumni Center/Traditions Hall:  
<https://www.usfalumni.org/s/861/02alumni/index.aspx?sid=861&gid=1&pgid=290>  
Jessica Smith: [jpsmith9@usf.edu](mailto:jpsmith9@usf.edu)  
Depending on conference purpose, there may be a fee  
Full service  
What are the Breakout room options?
- Marshall Student Center: contact varies by department  
<https://www.usf.edu/student-affairs/msc/>  
Full service  
Fee based: may be quite expensive if event deemed off campus event  
Various spaces to meet event needs
- CWY: Lori Matthews: [lorimatthews@usf.edu](mailto:lorimatthews@usf.edu)  
<https://www.usf.edu/undergrad/jmlc/cwy-event-space-rental/>  
Fee based after business hours  
May not be available specific days due to use as classroom  
Full service  
Depending on size needed up to 4 breakout rooms available
- TECO Hall:  
<https://www.usf.edu/education/anchin/contact/teco-hall.aspx>
- Other campuses:
  - St. Pete Campus: <https://www.stpetersburg.usf.edu/studentedule/university-student-center/plan-your-event/index.aspx>
  - Sarasota Manatee Campus:  
<https://www.sarasotamanatee.usf./events/event-venues.aspx>
- Off Campus
  - Embassy Suites: Barbara Tyler  
Email: [barbara.tyler@atriumhospitality.com](mailto:barbara.tyler@atriumhospitality.com)
  - Multiple options
- Speaker: Select speaker(s)
  - Contract negotiation
  - Processing through supplier and contract management

### **6-9 Months**

- Arrange housing accommodations for guests
  - Room block – courtesy or confirmed
    - Embassy Suites: Barbara Tyler,  
Email: [barbara.tyler@atriumhospitality.com](mailto:barbara.tyler@atriumhospitality.com)
      - Ask for USF rate
      - Breakfast included

- Free Hotel Shuttle provided to campus
- Determine Registration Process
- Create marketing plan
  - Assets needed – consider
    - Flyer
    - Invitation
    - Program/Abstract
    - Signage:
      - Wayfinding
      - Check-in
      - Labeling
      - Tent cards
  - For access to branded templates for marketing assets:  
<https://usf.app.box.com/folder/115871210631?v=casrebrandrollout>
  - Timeline
- Create Web Site, if needed
- Send Save the Date, if needed

#### **4-6 Months**

- Set up registration site
  - If there is a participant fee
    - Complete EBA
- Follow Marketing plan timeline
- Determine need for and sources for volunteers
- Determine on-site check-in process
  - Student Sign in Swiper
    - MariaJose Cardenas [mariajosec@usf.edu](mailto:mariajosec@usf.edu)
    - Link to form: [https://usf.az1.qualtrics.com/jfe/form/SV\\_9tck7Ti07D3Yw3H](https://usf.az1.qualtrics.com/jfe/form/SV_9tck7Ti07D3Yw3H)
- Arrange event logistics
  - Food and Beverage:
    - What caterer would you like to use?
      - Aramark
        - <https://usfcatering.catertrax.com/>
      - Other
        - Contact venue for outside caterer guidelines
    - What meals, breaks, receptions are you providing? Bar (?)
  - Décor:
    - Cas-events has a décor inventory for use by checkout:
      - contact: [cas-event@usf.edu](mailto:cas-event@usf.edu)
    - Is there a need for stage décor: plants, podium, etc.
    - Linen Options
      - Aramark \$8 white or black
      - Events linens \$8 for gold or spring green – see attached checkout form
      - Rental companies: Over-the-Top

- <https://www.overthetopinc.com/cgi-bin/customers/contact.cgi>
    - Plan Centerpieces include registration or bar decor
  - Rental Services: Recommended Vendors
    - Poster Session: Display rental companies:
      - Suncoast Display: <https://suncoastdisplays.com/>
      - Gulf Coast Expo: <http://www.gulfcoastexpo.com/>
        - Christopher Binion: [Christopher@gulfcoastexpo.com](mailto:Christopher@gulfcoastexpo.com)
    - Photographer:
      - JWS Photography Jarvis Walker
        - Website: <https://www.jwsphotographystudio.com/>
        - Email: [jwsphotography@outlook.com](mailto:jwsphotography@outlook.com)
    - Tables and Chairs
      - On campus:
        - USF Administrative Services: see attached forms  
[SCM-Events@usf.edu](mailto:SCM-Events@usf.edu)  
Wayne Wilcox at 974-5201 or  
Hollie Chancey at 974-7189.
      - Off campus:
        - Fiesta Solutions: <https://fiestasolutions.net/>  
Contact: [info@fiestasolutions.net](mailto:info@fiestasolutions.net)
    - Plant Rentals:
      - Plantz: <https://www.plantz.us/>  
Contact: [inbound@plantz.us](mailto:inbound@plantz.us)
  - Parking and Transportation
    - Tampa Campus: <https://www.usf.edu/administrative-services/parking/>
      - Parking (required) Options:
        - Reserved spaces: \$10/space for up to 10 then \$5/space thereafter
        - Lot access: \$2.50 per space
        - Signage: \$10 per sign (optional)
      - Bull Runner: <https://www.usf.edu/administrative-services/parking/bull-runner/index.aspx>
      - Ground Transportation
        - Walsh Airport Service  
<http://walshairportservice.com/> (813)960-3884
    - Other Campuses:
      - St. Pete Campus: Randy Pogue USFSP Parking Services  
Supervisor [poguer@mail.usf.edu](mailto:poguer@mail.usf.edu)  
Link: <https://www.stpetersburg.usf.edu/resources/administrative-and-financial-services/auxiliary-services/event-parking.aspx>
      - Sarasota Manatee Campus:  
Link: <https://www.sarasotamanatee.usf.edu/campus-life/campus-resources/parking-services/special-event-parking.aspx>
- Track Vendors through supplier management, contract management and payment processes

**60 Days**

- Create Day of timeline and supply lists
- Follow marketing plan timeline

**10-30 Days**

- Finalize floorplans and AV needs with Venue
- Ensure all forms required by Venue are submitted
- Create volunteer schedule and job assignments/descriptions
- Follow marketing plan timeline

**10-Day prior**

- Determine final attendance numbers
- Communicate with volunteers to confirm attendance
- Pick up borrowed supplies
- Provide final attendance numbers to caterer

**Event Day**

- Pack for event
- Event Set up
- Instruct and supervise volunteers
- Meet with Venue AV and/or test AV in each room used
- Execute Event
- Event clean up

**Post Event**

- Complete any post event tasks included in marketing plan
- Ensure all vendors are paid
- Reconcile budget
- Return borrowed supplies
- If this is an annual event, choose next year's date and reserve venue

**CONFERENCE EVENT PLANNING BEST PRACTICES**

- ✓ Be resourceful: engage with USF and community partners to improve your events
- ✓ Think Ahead: refer to this timeline, meet internal deadlines; meet external and/or vendor deadlines
- ✓ Walk through your event from your guests' perspective: this will improve event flow and details.
- ✓ Provide a variety of ways for your guests to engage: keynote/plenary sessions, small group sessions, networking opportunities.
- ✓ Provide information about local entertainment so guests enjoy the Tampa Bay area
- ✓ Communicate event details to vendors: this will help them serve you better
- ✓ Refer to event records: refer to records of prior or similar events as reference for budget information and planning details.
- ✓ Create and Monitor the budget: on a total basis and a per person basis
- ✓ Be aware of grants funding that may be available to you