

A handbook for organising a Thematic University-Business Forum of European Commission

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Bachelor's Thesis
Degree Programme in Tourism
2017



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Degree programme in Tourism	
Report/thesis title A handbook for organising a Thematic University-Business Forum of European Commission	Number of pages and appendix pages 26 + 57
<p>This is a product oriented thesis, where the final product is a handbook and guidelines for the event organisers of the Thematic University- Business Forums, which s commissioned by the European Commission. This product aims to help and support the future organisers of these conferences with their planning and organising processes.</p> <p>The handbook is written based on the authors personal experience on organising the Thematic University-Business Forum in Helsinki, 2016, as well as on theoretical background, benchmarking and consulting the commissioner and the organisers of the conference held in Helsinki. The writing process of the product was started in May 2016 and finished in November 2016.</p> <p>Thematic University-Business Forums are held several times a year, at varying European Union member countries. The conference in Helsinki was the eight to be held. The conferences usually last one and a half days, bringing together representatives of higher education institutions, companies, business associates and public sector to network, promote new practices and learn from each other.</p> <p>The thesis report begins with an introduction, and continues by offering background information about the commissioner and the organiser of the conference held in Helsinki. Theoretical framework is based on event planning and writing guidelines for working life. The theory is followed by description of how the product was created, discussion about the writing process and the outcome of the product.</p> <p>The product consists of matters that need to be done before, during and after the conference. It is divided into six phases in chronological order, followed by practicalities that the organisers' should keep in mind.</p>	
Keywords Handbook, guideline, event planning, conference	

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1 Introduction

The event industry is growing fast. Events are held all around the world and in all kinds of forms and sizes. People come to events to experience something new and interesting, and the more they visit different events, the more their expectations rise. Because of this, the pressure on event organisers is growing all the time. Having guidelines that state the most important things to remember and do, makes event planning processes easier for the organisers and helps to deal with the pressure.

This product-oriented Bachelor's thesis consists of two parts: the product itself and a thesis report. The outcome of this thesis is a handbook and guidelines for the organisers' of the Thematic University-Business Forums. The guideline contains information and practical instructions for inspiration, which the future organisers of the Thematic University-Business Forums can use as a general guideline during the event management process. The product can be found from appendices.

The thesis report's outline constitutes of six main chapters: introduction, background information, event planning, writing guidelines for working life, methodology, and discussion. The report starts with the introduction and continues to background information about the commissioner and one of the organisers of a Thematic University-Business Forum, this party also being the employer of the author during this project. These are followed by theoretical framework in chapters 2 and 3.

Chapter 2 which presents event planning, with introduction to events, event planning and management, and conferences. Chapter 3, writing guidelines for working life, going through the process from setting the aim, structuring the text, to language and tone of the text and using visuals, colours and fonts. The report ends with the methodology and discussion.

The aim of the thesis was to create a simple and readable, but efficient, handbook and guidelines for the future organisers of the conference. The main objective was to pick the most important phases that need to be considered during the planning and management stages. The handbook will also benefit the commissioner, since it gives the big picture of the main areas of organising the conference, thus lessening the amount of questions from the organisers. These conferences are held from one to three times a year and sometimes the organisers are chosen less than half a year before, so having a handbook makes introduction to the conference faster than communicating via e-mail or phone conferences.

2 Background

In this chapter, the background information of this product oriented thesis is described by introducing the commissioner, and the employer of the author, which was as well the organiser of the Thematic University-Business Forum, Helsinki.

2.1 European Commission

The commissioner of this thesis is the European Commission (later on referred to as EC). The EC is the European Union's (later on referred to as EU) politically independent executive arm and its office is located in Brussels, Belgium. The EC represents the interests of the European Union as a whole, but not the interests of individual countries. It is responsible for proposing legislation, enforcing European law and working as a guardian of EU treaties. (European Commission 2016a.)

The EC is formed by a team of 28 Commissioners, one from each EU country. In a nutshell, the Commission consist of the President, seven Vice-Presidents and 20 Commissioners. The members for the EC are chosen by the President of the Commission, who is elected by the European Parliament based on suggestions of the Member States. The term Member States is used as a synonym for the EU countries. (European Commission 2016a.) According to the EU (2016), the EC employs approximately 33 000 people in total.

Each team will work for five years on policy areas decided by the Commission President. The members do not have any individual decision-making power, unless the Commissioners authorise their actions within their own areas of responsibilities. The norm is that decisions are taken collectively by the Commissioners, each having one vote in case a vote is taken on decision making. (European Commission 2016b.)

2.1.1 Directorate-General Education and Culture

The EC is divided into several departments known as Directorate-Generals (DGs), which are mainly located in Brussels and Luxembourg (EUR-Lex 2016). The DG involved in the EU Forum for University-Business Dialogue is the Education and Culture (EAC). Their responsibilities lie within policy on education, culture, youth, languages and sport, by also supporting these issues via projects and programmes. (European Commission 2016c).

The DG EAC, as well as other DGs, is led by one of the Commissioners and a Director General who report to the European Parliament (EURASHE eurashe.eu, 2016). The rest of the team consists of lawyers, advisors, assistants, secretaries and other staff members.

2.1.2 University-Business Cooperation

Cooperation between universities and businesses at the European level, are highly supported by the EC (European Commission 2016d), thus a programme named University-Business Cooperation was created under the DG EAC. The outcome projects of supporting the cooperation between universities and businesses are The University-Business Forums and the Thematic University-Business Forums.

Besides the Forums mentioned above, a free self-assessment tool called HEInnovate was developed together with the Organisation for Economic Cooperation and Development (OECD) three years back. HEI stands for higher education institutions – the tool is meant to provide entrepreneurial HEIs with advice, ideas, and inspiration in assessing the HEIs in a systematic way. (European Commission 2016d; HEInnovate 2016.)

The EC supports the cooperation between universities and businesses also via EU-funded Knowledge Alliances that belong to the Erasmus+ programme, “the EU's programme to support education, training, youth and sport in Europe” (European Commission 2017). These are transnational projects that last up to two or three years and which bring together HEIs and business to work on projects, aiming to support the modernisation of Europe's higher educational systems (European Commission 2016e).

The HEIs and businesses can find studies, reports and examples on successful cooperation and the Forums from the website of the European Commission's University-Business Cooperation.

2.1.3 Thematic University-Business Forum

There are two types of Forums: an EU-level University-Business Forum that was established in 2008 and is held yearly in Brussels and Thematic University Business Forums that are organised several times a year in cooperation with Member States. (European Commission 2016d).

The Thematic University-Business Forums focus on varying themes in areas surrounding the Member State where the event takes place at. These events last normally one and a

half days and offer opportunities for representatives of higher education institutions, companies, business associates and public sector to network, promote new practices and learn from each other. (Thematic University-Business Forum, Helsinki 2016a.)

The decision upon the event organiser of a Forum is in the hands of the Member State representatives. The Forum held in Helsinki in 2016 was “a joint effort of the European Commission, the Rectors’ Conference of Finnish Universities of Applied Sciences Arene, Universities Finland UNIFI, The City of Helsinki, Enterprise Europe Network and Haaga-Helia University of Applied Sciences.” (Thematic University-Business Forum, Helsinki 2016b).

The conference in Helsinki was organised and sponsored by the European Commission, and Haaga-Helia University of Applied Sciences was one of the main organisers. It brought together over 200 participants.

In year 2014 there were altogether four Forums, 2015 one and in 2016 three: in Austria, Finland and Spain (European Commission 2016d) The Forum in Helsinki was the eighth Forum to be held. The Thematic University-Business Forums are free of charge for the participants and typically suggest optional social activities, i.e. dinner and sightseeing. The speakers arrive pro bono, but their travel expenses and meals will be covered by the EC.

2.2 Haaga-Helia University of Applied Sciences

Haaga-Helia University of Applied Sciences (Haaga-Helia) was founded in 2007 and is one of the largest universities of applied sciences in Finland with more than 10 500 students and 650 staff members (Haaga-Helia 2016a; Haaga-Helia 2016b). It has five campuses located mostly in the Southern part of Finland, from which the primary campus is located in Pasila, Helsinki.

Although Haaga-Helia is run privately, it is steered and co-founded by the Finnish Ministry of Education and Culture and it is an open university of applied sciences (Haaga-Helia 2016a). This is normal, since general compulsory education and basic education in Finland are free of charge, by Constitutional obligation (Finnish National Board of Education 2016).

Haaga-Helia prepares and educates professionals to business and services, as well as researches and develops these areas. Haaga-Helia (2016a), describes that their fields of

education are: “business, hotel, restaurant and tourism management, information technology, journalism, management assistant training, sports management and vocational teacher education.”

3 Event planning

This chapter will start by briefly discussing events and explaining what they are and how they are grouped. Afterwards, event planning and management will be introduced. The chapter will end by introduction to conferences.

3.1 Introduction to events

Events are defined as planned, important or notable, occasions or activities (Merriam-Webster 2016). The most typical examples of events are birthday parties, football matches, or business meetings. Some authors are using the term special events, to emphasize events that are planned, temporary occurrences that are different from normal day living (Getz 2012, 46).

Shone and Barry (2013, 8) suggest that special events could be defined as “those non-routine occasions that have leisure, cultural, personal or organisational objectives set apart from the normal activity of daily life of a group of people”. Dowson and Bassett (2015, 1-2) divide their definition of an event to three parts:

- An event is a planned gathering
- An event is temporary
- An event is memorable

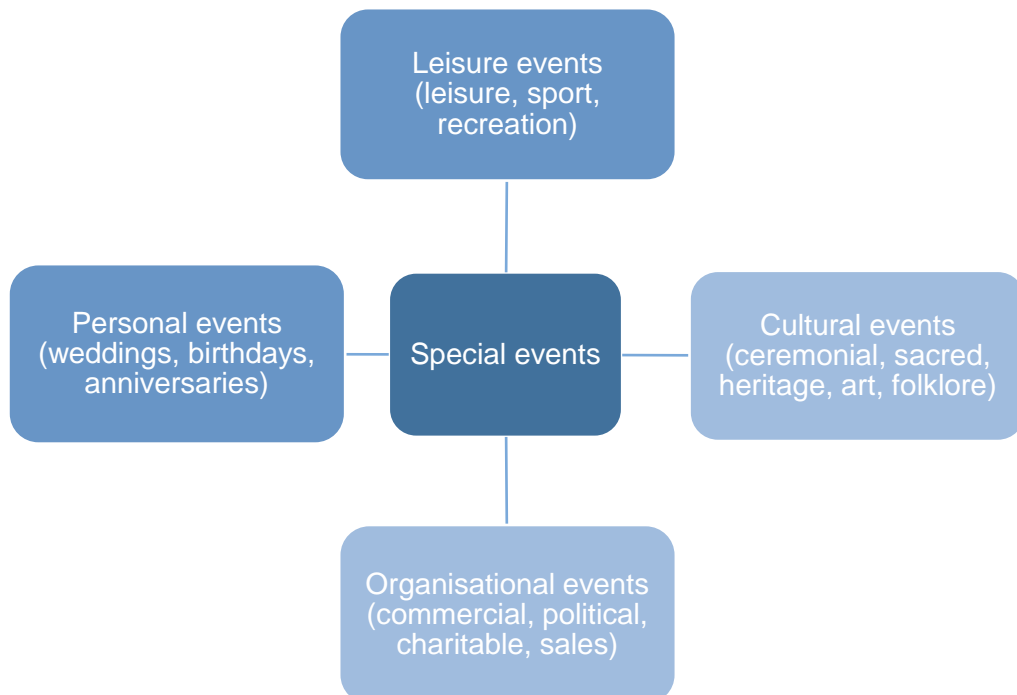


Figure 1. Categorisation of events by type (Shone & Barry 2013, 7)

Events can be grouped or categorised in various ways. The most common way of categorising events is doing that per type. In their definition of an event, Shone and Barry (2013, 7-8) propose splitting them into four broad categories based on their concept, but warn that overlaps will always occur: an organiser of the event might have different objective than the participant of an event. Figure 1. illustrates these four categories.

Events can also be categorised by their size, frequency, geography, sector, or internal and external. (Dowson and Bassett 2015, 3-8). Besides grouping events by their type, the other most common way is to categorise them by their size: from mega-events like Olympic Games, hallmark events like Oktoberfest in Munich, major events Wimbledon Tennis Championships, to local or community events. (Baum, Deery, Hanlon, Lockstone & Smith 2009.)

3.2 Event planning and management

Planning and managing events can be very time-consuming and labour-intensive, due to the diversity and individuality of them; no events are the same. Even though the event itself, like wedding ceremony and reception, might last only for half a day, the success, or failure, of it is widely dependant on what has happened a long before during the planning process. (Dowson & Bassett 2015, 21; Shone & Barry 2013, 116.)

Event planning and management is the process that is gone through planning and setting up an event, from choosing the venue, planning the theme, to actually managing the event and trying to keep the schedule during the event itself. Following this kind of a process helps the organiser or event planner to go through different steps or stages of planning an event. (Dowson & Bassett 2015, 20-21.) The frames and stages of event planning vary according to different authors.

Shone and Barry (2013, 118) propose a five step management activity for an event, including objectives and getting started, planning, organising and preparing an event, implementing: running the event, and lastly divestment/legacy. These steps can also be found from the three-phase event planning model introduced by Dowson and Bassett (2015, 22); preparation, detailed planning and post event.

The theories of Dowson and Bassett (2015, 24) and Shone and Barry (2013, 199), both agree that conceptualising an event and setting objectives are the starting point. After these have been set, the systematic detailed planning can start. Both theories agree that

this includes everything from financial planning, selecting the location, logistics, to staff recruitment. Shone and Barry recommend to reflect and discuss on the plans before realisation. (Dowson & Bassett 2015, 42; Shone & Barry 2013, 120.)

After the event, it is important to collect feedback and complete evaluation. Shone and Barry (2013, 313) address two key evaluation issues: did the event meet its objectives and what can be improved for the next time, if there is going to be one? This part stresses on the importance of setting up clear objectives right at the starting point (Dowson & Bassett 2015, 254).

3.3 Conferences

Conference industry is a rapidly growing young industry that traditionally forms parts of the business events (Rogers 2013, 2). Rautiainen and Siiskonen (2013, 4) explain conferences as happenings where a group of people come together to discuss, clear affairs, solve problems and consult on common causes.

Compared to congresses that are regularly organised meetings for hundreds or thousands of people from the same field of work or study, conferences are smaller in nature. (Rautiainen & Siiskonen 2013, 18.) Meetings on the other hand are often smaller in scale and can for example be held in-house.

The conference programmes mostly consist of different sessions and parts. Since all events differ from each other, as mentioned above, the content and programme of a conference is dependent on the organiser. (The most important conference terminology can be found from Table 1. below on page 9.)

Organising a conference needs hard work, attention for detail and creativity. Regularly held conferences will most likely already have a system in place, thus operating it might go smoothly with only some fine tuning, even though sometimes a fresh approach might be beneficial. In case of no previous event history, the organising and planning can be started straight from a clean sheet and more imagination can be used. In this case, the workload is also bigger. (Rogers 2013, 179)

Rogers (2013, 178) explains that the size of the conference affects the factors to be considered when organising one, but the essential components are always the same. He also mentions that other event types require similar steps. Rautiainen and Siiskonen (2013, 55)

suggest a framework for a meeting or conference plan, in other words a handbook, as such:

1. The aim and idea of the meeting or conference
2. Schedule
3. Budget
4. Venue and space reservations
5. Organisation or project team
6. Communications and marketing plan
7. Initiation of staff
8. Arrangements at the venue
9. Post-conference arrangements and feedback

Table 1. Conference terminology (Rautiainen & Siiskonen 2013, 18-30)

Type	Description
Forum	a meeting that involves discussion, either separately or integrated in a conference
General session	session open for everyone attending the conference
Keynote presentation	the main presentation(s) of the conference. Usually of high quality, touching the theme of the conference closely
Panel discussion	a session where a beforehand chosen topic is discussed within multiple speakers. The discussion is led by a moderator or a chairman
Plenary session	the main session of the conference, meant for all attendees. No other sessions are organised at the same time
Seminar	a meeting in which information on and training in a particular topic is received on. Focuses on broadening one's skills
Webinar	an online seminar to which one can participate from an own computer.
Workshop	a meeting where answers to a particular problem(s) or question(s) are searched for. A seminar that stresses on open discussion, sharing thoughts and showcasing different approaches

4 Writing guidelines for working life

In this chapter, writing guidelines for working life is discussed. A guideline is a compilation of instructions that should have a title that reveals to whom it is meant for. A longer guideline should be divided under different chapters. Instructions go step by step, just like a recipe for cooking. (Torppa 2014, 182.) There are guidelines for how to behave at the workplace, how to build furniture, or how to run a conference.

The main function of a guideline is to guide the reader through a task, process or a project, towards the desired object (Metsäaho 2013, 149). The purpose behind a guideline is not that the reader should read it from the cover until the end, but that the reader should find the necessary information by eyeing or scrolling, with hands or with eyes (Torppa 2014, 12). Some guidelines might be as thick as a book, so finding information from them easily is important. It is guaranteed, that everyone has or will be reading a guideline at some point of their lives, at home or at work.

4.1 Aim of the text

All the texts in working life are meant to be read by someone and each text aims to influence someone, or something; thus, the writer needs to know the aim of the text, substantial or modest. The writer should think about the aim concretely and choose the means in line with it; style, linguistics, and content. (Kankaanpää & Piehl 2011, 66; Torppa 2014, 19.) The aim of a guideline could be for example, to instruct the reader on how to organise an event.

Right from the start of the writing process, the writer needs to start by considering the most important complex: the reader. The writer should think about who is the reader, why would that person read the text, and how does the person benefit from the text? The reader does not read the text just as a compliment, but to benefit from it, therefore it is important that the information is clear and precise, and easily found. (Kankaanpää & Piehl 2011, 67; Torppa 2014, 17.)

It is important to have some information on the target group so that the style and scope of the text can be decided upon. If the target group is unknown, the writer should think about how old the readers are, are they men or women, do they represent a specific group? (Metsäaho 2013, 53.) The aim, and the knowledge the writer has about the reader, are the two main elements that influence the content and structure of the guideline.

4.2 Structuring the text

All publications need to be planned and implemented carefully, no matter if it is an advertisement, a book or a guideline. When starting to plan and design the guideline, the writer should start by gathering and drafting down the main content that should be communicated to the reader. This can be done just by drawing a mind map or by creating a bulleted list. Writing a draft is a norm on all kinds of writing processes, it is important to write down every thought there is; they can be proven useful later. (Kankaanpää & Piehl 2011, 32-34.)

Luukkonen (2004, 160-161) mentions that the three basic steps of writing a text are planning, drafting and finalising. In the planning process the aim of the text needs to be considered. Drafting should be done chapter by chapter and section after section. When drafting, the content starts automatically to take shape and it is easier to map out the structure. Metsäaho (2013, 49) suggests similar steps: plan, draft and finalise. She also recommends collecting feedback at least twice in between the two latter steps.

The first thing to do is draft the headings, main topics, or chapters. These do not have to be finalised, but rather working titles. Choosing the order of the information is much dependant on the aim. The most typical ways are to put the content in chronological order or in thematic order. The chronological order should be considered when it comes to an operational manual or assembly instructions, where a clear timeline can be drawn to picture a process or development. In chronological order, content is given in the order they need to be done. (Kankaanpää & Piehl 2011, 94.) This type suits instructions in an overall manner.

Thematic order should be considered when for an example the text describes different kind of options. The latter mentioned is most suitable for handbooks, if the text consists of multiple options, or instructions to multiple separate subjects. It can be possible to mix both of the options as well. (Kankaanpää & Piehl 2011, 101-109.) After naming the topics, the order needs to be decided upon. If no clear way of order of importance can be settled, the topics could be arranged for example alphabetically, or even randomly (Kankaanpää & Piehl 2011, 103).

Be noted that the structure of the text does not have to be and almost never is, in the final form in the beginning (Metsäaho 2013, 58). When more content is created, the puzzle

pieces start falling into places and organising the chapters will end up being more comfortable. Some writers freeze right in the beginning of the process, so that it feels like no words or content are coming out to the paper or to the screen (Torppa 2014, 36).

If it feels like a struggle to start writing, start from any part of the text – the middle or the end. Often after getting started, the process gets easier. There will be times when it feels like writing is not fun, so Metsäaho (2013, 65) advises to find different kind of ways to fix the struggle. An example would be using a mind game, or going for a short walk.

Torppa (2014, 21) suggests a tool to make the structure of the text easy to read for the reader: Write a fact and think about what kind of a question it will raise in the mind of the reader. The next sentence you write should answer the question and raise another one, to which the third sentence answers for, and so forth. Kankaanpää and Piehl (2011, 297; 302) suggest dividing the instructions to short lists, or sentences written on separate rows.

Short sentences and chapters fit the texts meant for working life and keep the text easy to read. One chapter should have between five to seven rows. To make the reading of the text easier, it is recommended to use chapters and pictures. Most likely the reader will look at the picture first, the text should be written completing and explaining. (Torppa 2014, 21; 184)

Metsäaho and Torppa (2014, 182-183; 2013, 59) both agree that the headings and titles have a significant role in guidelines – the first source for looking for information is most likely the table of contents. The headings and titles should be precise so that the reader can find the information with no effort. Kankaanpää and Piehl (2011, 169) state that the reader of a guide often uses subtitles as a directory. In the planning process headings that state the core content make it easier for the writer to stay within the subject, according to Luukkonen (2014, 196). Moline (2011, 217) lists headings and subheadings as signposts; things that help the reader to navigate around the text when for example scanning for some specific information.

In the finalising process, the text should be read through a few times and attention should be paid to that the text is understandable, and that it creates the right visions. (Luukkonen 2004, 200.) The last thing is to finalise the spelling and to make sure that the headings and titles are relevant (Metsäaho 2013, 63).

4.3 Language and the tone of the text

When writing guidelines and instructions, written language and simple words should be favoured over spoken language and complicated terms. This suits all target groups and keeps the text simple to read. In case spoken language is to be used, the writer should know the target group in more depth, since it is not always acceptable. (Metsäaho 2013, 56; Torppa 2014, 59.)

Uncommon words and abbreviations should be explained to the reader when first used. The words need to be understandable and clear, to make the reading process easier. Explaining complicated matters in a simple way should be possible; professionals within their own areas can speak and write in their own language, otherwise the text should be translated to more common language. Some languages might not have translations for all the words, which might turn out to be a challenge. (Torppa 2014, 31; 186.)

When it comes to the tone of the text, Torppa (2014, 185) instructs on putting the verbs in the imperative form. The imperative form is used when giving commands like “create a communications plan”, it does not have a subject, so it does not command the reader personally. Torppa also states that this simplifies the text and reduces the number of extra nouns, even though many writers are hesitant of using it, due to being afraid of sounding negative of the possibility of the reader being insulted by it.

On the other hand, Metsäaho (2013, 149) states that the imperative form without the exclamation mark is indeed used a lot, but thinks that a positive form works better over the imperative form. Unlike Torppa (2014, 185) Metsäaho would prefer using a bit more complex sentences to avoid sounding too negative. Estimating the tone of the text can be challenging for the writer. For some, strict and shortly put instructions can be expected by default, but some expect the instructions to be more friendly. (Kankaanpää & Piehl 2011, 244).

4.4 Using visuals, colours and fonts

Pictures and other visuals can be used to shed light on the topic discussed. The meaning of colours and visuals is to wake the interest of the reader and to support the content of the text (Luukkonen 2004, 41-42). There can be graphical instructions, and in these cases, they must be followed. Luukkonen (2004, 41) suggests that sometimes one’s personal interests take over and the visuals do not match with the organisation behind the handbook, nor the content.

It is important to remember that no matter how simplified the visuals are, they need to be clear and of high quality. Typically, the reader will notice the picture first, so it is recommended to write the text so that it completes the picture. (Torppa 2014, 184.) According to Torppa (2014, 184) a clear order for the writer, would be to first think about the content, then create the visual content, and only after that write the actual instruction part.

When creating the visuals, it is advised to be moderate with the graphics and the special effects (Luukkonen 2004, 42). A predetermined typographical instruction; font, font size and colour; makes it easier for the writer. (Metsäaho 2013, 94). According to Moline (2011, 211) the choice of typography is dependent on the purpose of the text, so there are different kind of fonts used for printing, newspapers, advertising and headings. Any text meant for reading, which has long paragraphs, needs to be readable, so the font should be chosen accordingly.

Some of the important basic visual attributes of a text are font, font size, spacing and margins (Luukkonen 2004, 97). Colour is also a big factor in graphic design. If colours are used, it can be important to consider that the meaning of a colour can change from culture to culture, for example in Japan brides wear red, but in Western culture it can be considered erotic and racy. (Lupton & Phillips 2008, 71.)

The colour wheel invented by Sir Isaac Newton in 1665 can be proven useful when colours are chosen. Colours that are close to each other are similar, which means that when they are used together the colour contrast will be minimal. Opposite of that would be using colours that are located on the opposite side of each other: warm versus cold. (Lupton & Phillips 2008, 72.)

5 Methodology

The purpose of this product oriented thesis was to create a handbook for the European Commission's Thematic University-Business Forum conferences. The commissioner, European Commission, had asked CIMO (The Centre for International Mobility) for a possible student interest on writing a handbook for the Forum, which did not have any guideline at all. CIMO communicated the request to Haaga-Helia University of Applied Sciences, through which the author received the assignment. The author had just started as a trainee for the event working at Haaga-Helia as a project assistant trainee.

5.1 Process of creating the product

The writing process of the Handbook and guidelines for the organisers of the Thematic University-Business Forum was started during the event management process and completed five months after the event had been held. The aim was to create a clear but instructive handbook, that can be edited furthermore by the future organisers of the Forums.

The author has personal experience on organising the Forum, due to being a part of the organisational team of the conference held in Helsinki. The handbook and guidelines was written by using multiple methods, such as benchmarking, brainstorming and pilot testing. It was co-created by asking for advice from the other team members and the commissioner representative from the European Commission.

The process of creating the product started after the commissioner had noticed the need for it and the author had received the topic (see Figure 2). The author's internship within the conference affected the motivation and decision of accepting the challenge.

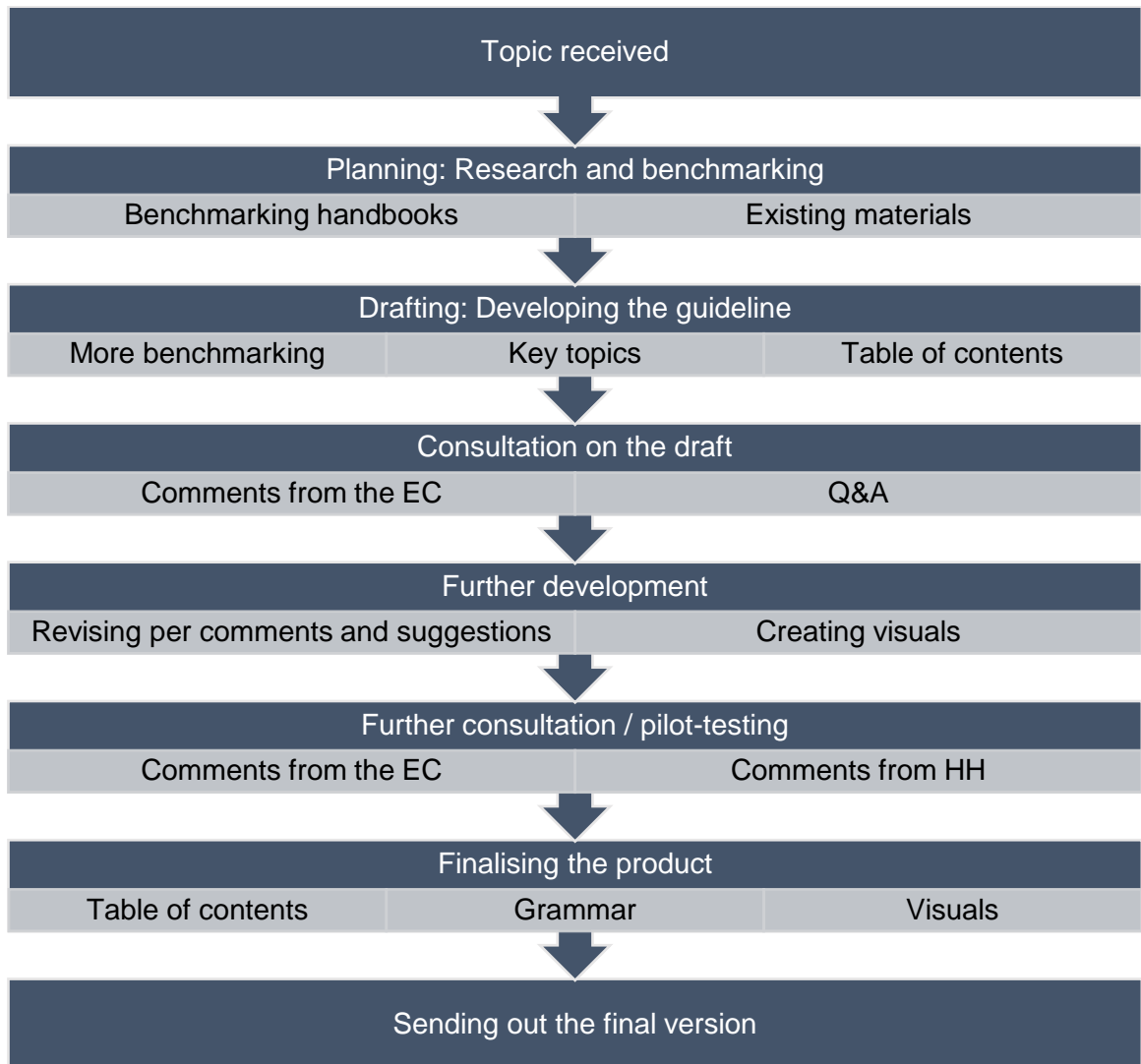


Figure 2. Process of creating the product

Right before creating any content, the author did research and benchmarking on other event handbooks. The target group, in other words future readers, was already known since they would be the future organisers of these conferences. By doing so, an overall idea on the table of contents started forming. The author also researched existing materials of the Thematic University-Business Forum itself. Getting access to documents was challenging, since they were not uploaded to any database, but rather found from separate e-mails sent between the organisers and the commissioner.

Researching and benchmarking continued on the side, when the drafting started by defining the key topics. These also formed the first table of contents that was meant to give direction to the author. The table of contents was finished only as one of the last steps, after all the content had been created. The key topics listed at first were the ones that the author thought to be overall most important, such as organisation, theme and programme,

communications and marketing. The benchmarked guidelines and knowledge gained during organising the Thematic University-Business Forum in Helsinki, were used as sources of information.

Whilst the first draft of the handbook was completed, containing all the main topics and mostly just ideas of possible content, consultation was sought from the commissioner. The writing process continued when waiting for answers, but further development occurred only after. The feedback and revision was done and the creating of visuals started. At this moment, the more important topics were expanded upon, and the font and colours were decided.

When the second draft was completed, all the topics and subtopics that had been created, were organised in chronological order, except for the chapter “Practicalities”, where the topics were put in alphabetical order, since there is no straight forward timeline for doing them. Most of the visuals were also created and the layout of the handbook was designed. Comments were asked again from the commissioner, this time also from the three organising team members from Haaga-Helia University of Applied Sciences.

Finalising the product by checking grammar, going through the visuals and revising the comments from the team members took most of the time, but afterwards the handbook reached its final form based on them. The author also checked that the same typology, line spacing, margins and colours were used throughout the whole handbook. The final version of the handbook was sent to the commissioner in October 2016.

5.2 Compiling the handbook

Compiling the handbook started after the planning phase, by just creating text and content. The text was not written in any specific order, but more in the order of the topics the author knew most about, which seemed to be the way forward. The aim, and instructions from the commissioner, was to keep the language simple so that a non-native English speaker can understand. To make the text easier to read and understand, paragraphs were also kept short, and the line spacing was set to 1,5.

When it came to the font and colours used, the author benchmarked other event handbooks to see how they are used elsewhere. The other handbooks also gave the author an idea of what kind of a handbook seems interesting and what boring; especially colours seemed to affect this. The choices were made based on the benchmarked handbooks and

instructions from the European Commission. The commissioner did not instruct the author to follow-up on their guidelines, but it seemed to be a logical option.

Since the product was made for the European Commission, their instructions on visual identity; typography and colours, were the first thing assessed. The font “Verdana” was chosen based on the guide, since their official font is not yet available outside the EU softwares. The European Commission also had instructions on the typography and font sizes, thus the font size was set to 11. Changes on font was instructed to do by either multiplying or dividing by the Golden ratio 1.6, since “the contrast of size is very important for visual effect and distinctiveness” (European Commission 2017f, 38).

The colours were also chosen from the European Commission’s official instructions on visual identity, out of 122 different colours and their shades. This was not required by the European Commission, but the author found that this was a comfortable way to find matching colours. To keep the text easy to read, the colour of the font was chosen to be black. Shades and mixes of blue and green were chosen to be used as highlights, as well as in visuals, and they are used throughout the handbook.

To visualise the text and to increase the interest of the reader, some figures and pictures were used. The commissioner also wished for some use of imagination and highlights. All the visuals used in the handbook were created by the author, either by using Microsoft Office tools or Piktochart PRO subscription. They were created after most of the text had already been written.

The author designed the cover page using the same tool as used for other graphics; Piktochart. The basis of it was ready: the blue background and the lighter blue triangle. Other elements such as the texts and the silhouettes of houses were added by the author. The aim was to have a simple and clear cover page, which let the reader know immediately what the document is about.

Since the main reason for the handbook is to give instructions and guidance for the reader, the first page of the handbook was designed to be a roadmap through the organising process of a Thematic University-Business Forum. The basis of the picture was a template in Piktochart, but the author re-designed the shapes by adding some and removing some irrelevant objectives. The colours used in the roadmap are the same that run through the whole handbook. The author also added boxes and pictures explaining the stages in a nutshell.

The handbook is divided into eight larger chapters, of which after foreword come six phases in chronological order, followed by practicalities which are organised alphabetically. The practicalities were chosen to be last, due to most of the issues not being in any chronological order. Last but not least comes background information about the European Commission and the event itself. The headings and subheadings are kept as short and simple as possible.

6 Discussion

This chapter discusses the feedback received, project evaluation and the author's own reflection. As mentioned in the beginning, events are organised all the time, with a growing trend, so it is good to have guidelines on how to organise them. The author has a growing interest in organising events, as a result this was a great project and an opportunity to learn and push boundaries.

6.1 Feedback received

As mentioned before in the process of creating the product, feedback was asked straightforward on two stages; twice from the commissioner and one time from the organising team of the conference held in Helsinki. The first time it took a few weeks to get a response, but the representative of the commission seemed happy and encouraged for more visuals. The representative gave a lot of positive feedback as well as ideas of improvement, and had also proof-read the text.

For the second time the representative for the commissioner changed, and unfortunately, did not answer to any of the author's feedback requests. This made the process of continuing the writing harder and infuriating for the author, since it was hard to know what was still needed to be added or changed. The representative never responded to the finalised product either, so it is out of the hands of the author what will happen to it in the future.

A good amount of feedback was received from the organising team members from Haaga-Helia. If there were any questions on any stage of the writing process, some of them would answer to the questions asked. All three team members had read the handbook and had their own notes and ideas. A meeting was held at Pasila campus premises and the handbook was analysed from cover to cover. The final version of the product was written based on the notes from the meeting.

6.2 Evaluation

The guideline will play an important role in the organising and managing process of the oncoming Thematic University-Business Forums, since they will be organised multiple times a year and there was not yet to exist a database for information. The author's opinion on sharing crucial information on the organising process should get easier.

In general, the handbook is based on the experiences of the author and advices from the Haaga-Helia team members and the commissioner. It is little based on theoretical framework, since it was agreed that the information added should be as practical as possible, and that it should be assumed that the future organisers have some experience on event management.

The handbook should be somewhat reliable. What needs to be taken into account is that it is based on mostly on experience on organising only one of the forums, but as the representative from the commissioner said; all the conferences should add a touch of their own. The author believes that the handbook will become more reliable in the future, when future organisers will edit it and add their own experiences.

The writing process was long and hard. The author had struggles on receiving feedback as mentioned earlier, as well as on how to begin the process. It was hard to start writing when the sheets were empty, and there were so many ideas. A lot of time was spent benchmarking different handbooks, to get an idea of how the product could be like. One of the main issues was how to write down information on instructions as clear as possible, and so that it applies all around the world, not only in Finland.

6.3 Reflection

Mainly the process of writing this product and thesis were as the author expected. This project offered an incredible experience in the field of event management, and it will be useful in the professional career of the author. Helping to organise an international event for over two-hundred people also strengthened the author's wish to work in the industry.

Secondly, a big benefit came from reading all the books on event management and conferences, as well as on how to create text in working life. The latter mentioned books were used for sources on writing guidelines. Finding sources for this topic was hard. It can be said that the author also learned to look for information from the library and online.

The author was satisfied with how the product turned out to be (see Appendix 1), but not on how the implementation process took place. At first the plan was to finish by Christmas, until the commissioner informed that the product should be ready by July. Later on, the commissioner made no replies to the messages, thus the deadline was moved to late October by the author.

The last two months of finishing the product were not as productive as hoped, due to communication breakdown with the commissioner. It was learned that it takes will and a lot of time to sit down and really focus on writing a product such this, and that attention needs to be paid to communications. Improving one's time management has been a by-product from all of this.

For the future development of the product, an author could increase information on information on marketing, financial management and risk management. Since the Bachelor's thesis has its limitations, all the possible topics could not be covered in the handbook. Thus, the author hopes that the future organisers of the conferences will add their experiences and knowledge to the handbook.

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Appendices

Appendix 1. Thematic University-Business Forum - event organisers' handbook and guidelines

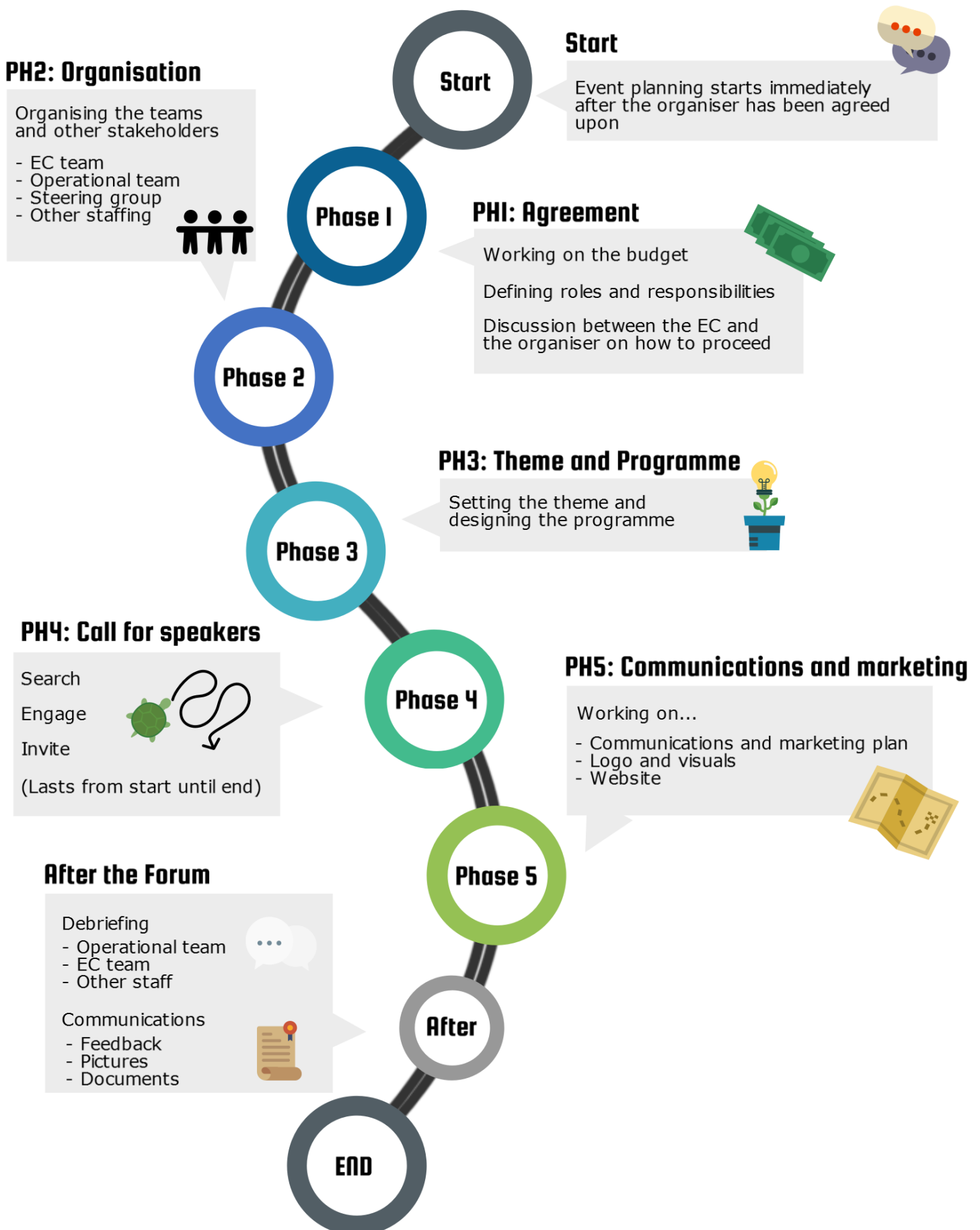


Thematic University–Business Forum

● Event organisers' handbook and guidelines ●



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Foreword

This handbook is intended to guide the organising teams of the Thematic University Business Forums on planning and running the conferences. It contains information and practical instructions for inspiration, that can be used as a general guideline during the event management process.

This handbook starts by going through the different phases of the planning process and continues with various practicalities. It is based on the formats of the Forums held in 2014 and 2015. There could be another format that suits your Forum better.

All events are different from another, so there is not only one way of organising the Thematic University-Business Forums. In contrary, it is intended that each Member State gives their own special touch to the Forums.

It is desired for the future organisers to edit and create new content to this document. Remember that nothing stops you from generating something completely new!

The first edition of this handbook was prepared by Laura Hämäläinen, Project Assistant of the Thematic University-Business Forum, Helsinki 2-3 June 2016.

The frame of this handbook is based on the programmes and formats of the following Forums:

Finland (2016) - Thematic University-Business Forum, Helsinki, June

Austria (2016) - Thematic University-Business Forum, Vienna, February

Lithuania (2015) -Thematic University-Business Forum, Vilnius & Kaunas, September

Phase 1: Agreement

The whole process starts by the EC choosing the Member Country in where the Forum will be held. They will then discuss with possible organisers about who will be operating the organising process. It is possible to inform the EC about an interest to organise a Forum.

After the organiser of the Forum has been decided upon, an agreement on the progress will be made between the EC and the organiser. This agreement is just formal, about how to proceed.

Looking back, you should calculate 9 to 12 months from idea to realisation depending on your organisational capacity and period of the year. You should also anticipate a stand-still during summer and Christmas breaks.

Budget

At a very early stage, you need to determine the budget with the EC. Please note that there is no direct financial support from the EC; all the expenses covered by the EC will go through a travel agency.

When you have drafted out a budget including all major expenditures send your suggestion to the EC. Note that based on your budget draft, the EC calculates its contribution slice that must be respected strictly.

Since there is no direct financial support from the EC, you need to clarify roles and tasks of different parties i.e. the travel agency, organising body and possible sponsors. At this point you should think if you could get sponsors to support with some of the expenses.

Below you can find an example of a budget estimation template. Try to be as thorough as possible when calculating the costs. This will help you to avoid rabbit holes later – sometimes “hidden costs” like posters, menu cards, flower arrangements, or pens and markers might surprise organisers at a later stage.

Event Budget

Expenses

		Estimated	Actual
Total Expenses		0,00 €	0,00 €
Venue	Estimated	Actual	
Room and hall fees			
Dinner venue			
Microphones			
Technical equipment			
Tables and chairs			
Decorations (flowers etc.)			
Venue staff			
Total	0,00 €	0,00 €	
Marketing & comms	Estimated	Actual	
Graphics work			
Photocopying/Printing			
Leaflets			
Postage			
Website			
Total	0,00 €	0,00 €	
Registration	Estimated	Actual	
Registration desk			
Name badges			
Stationery supplies			
Other (what?)			
Total	0,00 €	0,00 €	
Catering	Estimated	Actual	
Dinner			
Lunch day 1			
Lunch day 2			
Coffee day1			
Coffee day 2			
Drinks			
Linens			
Catering staff			
Other (what?)			
Total	0,00 €	0,00 €	
Speakers	Estimated	Actual	
Travel (domestic)			
Travel (flight, taxi)			
Accommodation			
Other			
Total	0,00 €	0,00 €	
Other costs	Estimated	Actual	
Performers			
Photographer			
Printed programme			
Signage			
Roll-ups			
Dinner invitations			
Menu cards			
Other (what?)			
Total	0,00 €	0,00 €	

Phase 2: Organisation

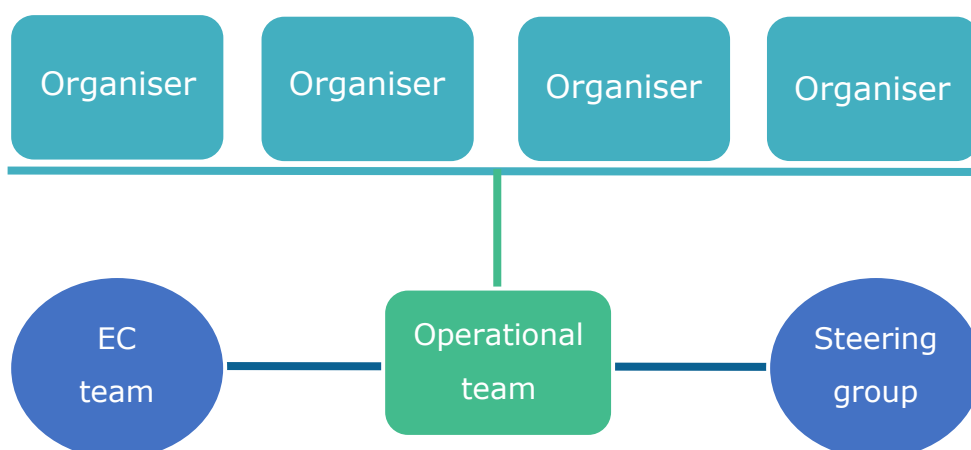
After the EC confirms the Member State hosting the Forum and it has been agreed on with the Member States organisation representative, it is time to team up. Building the main team(s) is the duty of the on-site organiser.

In some cases, it could be possible and advisable to have two or more organisers for the event. It is important to identify the partners co-organising the Forum right in the beginning.

Given the nature of the event it is necessary to have the involvement of Employers association(s) on the Forum.

Below you can see an example of a chart showing the structure of different kind of teams. There can be more than one organiser on the Forum. The organiser(s) assign an Operational team that manages the organising process of the event, as well as gather together a Steering group.

The Operational team is the centre piece when it comes to communications between all the groups, since it is the team responsible of making arrangements and implementing plans. It will receive instructions and suggestions mainly from the EC team, but also from the organisers and the Steering group.



University-Business Cooperation Team

Role: To give directions and opinions. Have a final say on all major matters regarding the Forum.

The University-Business Cooperation Team representative(s) come from the European Commission, DG EAC. The representative(s) of the EC will be your contact person(s) in case of issues and questions – especially on budget and visual identity. They will be accepting and advising on the crucial decisions and parts of the programme and logistics.

The EC team communicates with the Operational team. Personal meetings in the initial phase are recommended. Phone meetings with the EC team should be held at regular intervals. The phone calls work as a main channel of communications, but in between the development of matters can be discussed via e-mail.

Operational Team

Role: To plan, operate and implement the whole organising process of the Forum.

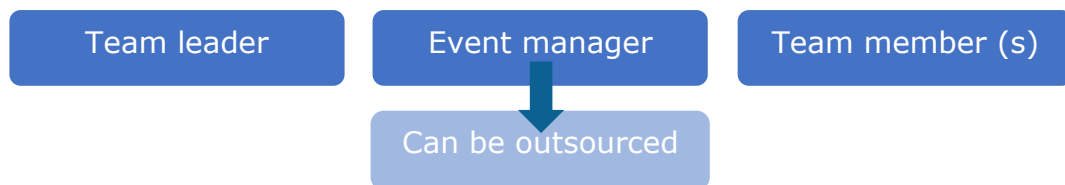
The most important team from the perspective of event management, is the actual Operational Team – even though the team follows the wishes of the EC and the possible steering group and/or other organising members – the implementation of the plans land on their hands.

The Organisational Team is the body closest to the actual planning and organising of the Forum, being responsible of creating more detailed content to the Forum guided by the decisions of the steering group (if there is one). They are in charge of contacting the speakers as well as maintaining the communications until the post-event tasks are completed.

It is advisable that the team has a team assistant as a part of the team. His or her mission to help with the time-consuming tasks that do not require making major decisions. A functional team would have from four to five core members.

Each member of the Organisational Team should have their own role right from the beginning. To avoid confusion and communication breakdowns, the main areas of responsibilities should be divided clearly.

After the team has been gathered together, it is recommended to start drafting an overall conference timeline. When this has been done that, it is easier to start mapping out the need for other human resources. Note that in Lithuania (2015), event management was completely outsourced.



Steering group

Role: To support the planning process and to provide professional advices.

Steering group is something that the organising body can decide upon. It is not compulsory to have one, but it could make the organising process and setting the agenda easier.

The task of the steering group is to support the planning of the Forum by working with bigger elements, i.e. mapping out and deciding on the theme, identifying topics and speakers.

Members of the steering group could be for an example, local university representatives, company representatives and employer organisation representatives. In an ideal case, there would be a member from each co-organising party in the group

A member from the Organisational Team should be in the Steering Group as well. If that is not possible, one should at least participate on their meetings to give briefings and to receive updates.

At the first meeting the Steering Group should discuss the schedule and the planning process, the responsibilities of the Steering Group and agree on what would be a reasonable time-period between their meetings.

Other staffing

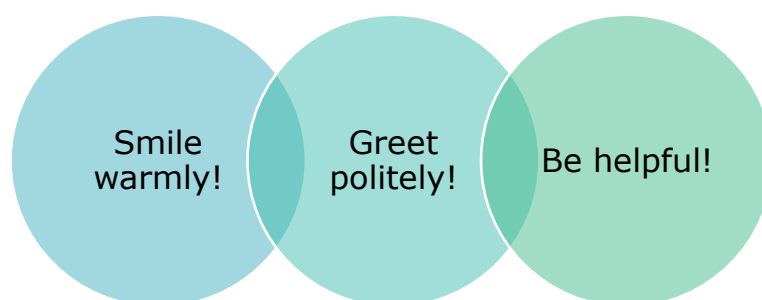
Role: To help out and support in various tasks during the organising process.

Besides the full-time staff organising the Forum, some extra human resources will be needed. The Operational Team cannot of course handle all the work alone, especially during the event itself.

When planning for the on-site teams the first thing to do is to map out the main areas where staff are needed, e.g. catering, technical assistance, registration. Calculate how much manpower you will need approximately and compare that to the amount of staff you already have for the event.

Taking in mind the nature of the event, cooperation between higher education institutes would be suggested. The students could be involved, under supervision, with everything from creating the printed programme, to planning and building the registration desk, to working as event staff during the conference days. It is important to ensure that there is guidance and support available for student staff, and this requires man power too.

It is also possible to outsource the event manager that will be in charge of the actual event planning.



Phase 3: Theme and programme

The EC team will discuss the idea behind the Forum with the organisers. The overall theme of the Forums is University-Business cooperation, but each Forum will focus on their own specific themes and topics.

As mentioned earlier, the steering group's mission is to work on the outline, overarching theme and title and the descriptions for them. They will make suggestions and the team will discuss and agree on them with the EC.

The communications procedure is dependent on the structure of the organiser(s). As mentioned before, the centre piece of communications is the Operational team. This makes it important to include the Operational team in the planning process.

Inspiration for the process of deciding the format design can be found by visiting the programmes of previous forums (see below).

Even though the Forum has one main theme, depending on the set up it can have various topics under the theme. Topics will come together later, since they are dependent on the speakers.

You should not publish the theme or topics without the approval of the EC.

Designing a smooth programme

When designing the programme, it might be hard to recognise the common line. Try to see the programme and possible panel discussions and streams as a whole. For example, the panel discussion after the keynote could continue with the same overall topic.

Typically, the opening speeches of the Forum are held by the organiser representatives and/or the EC. The closing speech of the Forum is traditionally done by the EC representative.

Reserve enough times for the breaks, so that people will have enough time to eat, use the bathroom, move around the premises a little and network. Do not forget to calculate a transfer time between different places.

When it comes to the actual contributions, the presentations, the EC states that the shorter the better. When keeping the cases shorter, the attention and interest of the participants is not lost that easy.

Different kind of sessions need different kind of time slots. For an example a breakout session or workshop case might not need an hour like a panel discussion would. For a short session like a breakout session, reserving 10 minutes for the presentation and 15 minutes for discussion, is recommended.

It is a good idea to add elements that touch or move the participants in some manner, for an example by having interactive elements. These experiences are something that the participants will take home with them and remember the event from.

For inspiration, you can take a look at the programmes of the previous Forums.

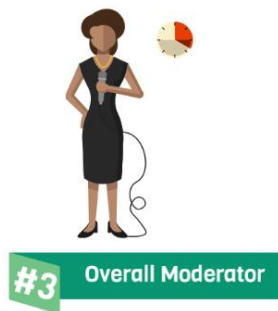
Programme of the Forum held in Helsinki, 2016:

www.ubforum-finland.eu/ubforum/programme

Programme of the Forum held in Vienna, 2016:

www.ubforum-austria.eu/programme

Phase 4: Call for speakers



Above you can find an outline of the most common contributors and from below you can find overall descriptions of them. Keep these groups in mind when drafting the communications plan – each group has a role of their own, thus they might need different or individualised information.

#1

- Keynote speakers are the main magnets; their presentations should touch the theme closely

#2

- Speakers for the panel discussions should be chosen accordingly to the topic/theme, keeping in mind that each would bring a different point of view to the discussion

#3

- Overall moderators are responsible for running the plenary and other parts of the forum. After having been briefed by the Operational team, moderators should contact panelists

#4

- Speakers for the breakout/parallel sessions should have different case presentations, matching the theme of each stream

#5

- Workshop facilitators are responsible of running the breakout sessions and time management. After having been briefed by the Operational team, facilitators should connect with the speakers of their stream

#6

- Rapporteurs are appointed by the EC. They take notes and write down main points of each breakout/parallel session streams. They will analyse the sessions and highlight the lessons learned the next day, thus they need to be analytic and able to criticise

#7

- Note takers are appointed by the EC. They are responsible of producing a report of the whole event to the EC. They will most likely prefer to meet the rapporteurs before or after the Forum to discuss the feedback and outcomes of the sessions

#8

- Host(s) are typically representatives from the organisational body, the EC, and if applicable, the steering group organisations and main sponsors

Searching, engaging and inviting

Searching, engaging and inviting speakers should start already at least eight to six months before the event, but is recommended to start as early as possible. Be prepared that this process will most likely continue throughout the whole organising process.

The speakers and their presentations need to match the theme of the Forum; thus, it can be a challenging process to gather together a compatible group. The hardest part of piecing together the programme, is indeed to find matching speakers.

When looking for contributors for the Forum content, it is important that the speakers have a very good command of English, presentation skills, and a story to tell. Workshop facilitators, rapporteurs and overall moderators should also have previous experience of their tasks, to ensure the professional touch of the conference.

The Steering group may already have suggestions for the keynotes as well as for other speakers. Work together when searching for possible candidates:

- Look for “new faces”
- Who would fit the theme?
- Who would fulfil the profile of a moderator, rapporteur or facilitator?
- What is the hot topic at this moment?
- Who would make the Forum experience more memorable?

Having someone of high profile as a keynote speaker is recommended. In case that it is not possible to arrange this, focus on other skilled and interesting speakers. It is important that the keynotes are interesting and engaging, and have cases that complement the theme.

Remember to mention, that the EC covers the travel costs and accommodation, but otherwise speakers present bro bono

SPEAKER RATIO: Please ensure that the gender division, geographical spread, and rate between speakers from the Member Country and speakers from abroad, are balanced. It is ideal to have 50:50 rate in all mentioned above

Choosing the speakers

After you have received answers and formed some kind of a pool of potential speakers, gather the list of suggestions and send it to the EC. You should prepare for having a good amount of suggestions at once, due to the complicity of the choosing process.

The EC team will have their own suggestions for speakers as well – especially for rapporteurs and facilitators, so remember to keep the conversation active. It is highly possible that the speaker setting needs to be adjusted multiple times, due to speakers that are not available or do not fit the theme.

When communicating with the speakers, do not forget to indicate that the final decision will come from the EC, so do not confirm anything yet.

Even though you might have received the target number of acceptances, it can be that some of those speakers do not quite fit the theme after all. You will just have to continue looking for more suitable candidates if possible.

When matching the speakers, ask yourself do the cases complement each other? Is there a continuity, inner logic and flow?

Try to send out invitations to newly identified speakers as soon as possible, so that you can send a confirmation to the ones who are available and agreed on with the EC.

- Green light: send an acceptance message to the speakers that have been accepted by the EC
- Red light: send a message to the speakers that could not be fitted to the programme. Thank them for their readiness and ask if they would be interested to contribute to an event in the future

Phase 5: Communications and marketing

Marketing of the Forum needs to be appropriate: the target audience, theme and the size of the event have to be decided upon at a very early stage. You can start marketing only after those points have been confirmed.

Announcement of when the registration will open should be mentioned right in beginning, but not before there is some content and descriptions on the website. Note, that if you say that “the registration will open in March”, it should open in March.

To spread the messages as widely as possible, using all of one’s contacts and e-mail lists is recommended. Further marketing materials are on the hands of the team and depend on the target size and progress in registration numbers.

If there is another forum the same year, it would be ideal if a member of the Operational team could attend to do benchmarking – for advices and inspiration, and also to market the upcoming Forum by for an example distributing “Save the date” fliers.

Communications and marketing plan

The communications and marketing plan needs to be created right in the beginning of the planning process. The plan and schedule should contain at least the following:

- Key messages
- Materials
- Channels that will be used
- Target groups

State down clearly the task and when it is due. Naming the person responsible makes recognising one’s tasks easier. Included could be also the progress of the task - is it already started or is it finished?

Accurate communications and marketing plan is put down to weekly tasks, if not daily.

CAMPAIGN	Notes	Month				Month			
		Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8
Website									
Banners									
Core content									
Detailed content									
Social media									
Facebook									
Twitter									
Prints									
Leaflets									
Posters									
Programme									
Comms									
Partners									
Sponsors									
Speakers									
Participants									
Other									
Etc									
Etc									

Task: Do this and that
Responsible: Jane

Above you can see one way on how to create the communications and marketing plan. This example is made in Excel and is visualised by using colours. More details can be added via inserting comments.

The communications plan can be very different depending on who creates it and for what kind of project it is. The most important thing is that all the team members understand how to read it.

Logo and visuals

Each Thematic University-Business Forum should have its own logo – with good enough resolution to be used in printed materials as well as in communications and on social media.

Design and layout are the responsibility of the Organisational Team, but the knot theme needs to be kept. The knot symbolises the collaboration between universities and businesses – stronger together than alone.

See examples from previous Forums below.



The first logo from top is from Vienna (Austria, 2016), second one from Helsinki (Finland, 2016), and the third one on blue background is from the EU level University-Business Forum held in Brussels, Belgium (2015). The two below are from Vilnius and Kaunas (Lithuania 2015), and Berlin, Germany (2014).

Besides the logo, it is recommended to create a colour scheme that will be used in all the Forum related materials to create a recognisable common line. The colour scheme can be decided by the team and/or the body designing the logo and other marketing materials.

Website and e-mail

Design the [website](#) and its layout is again the responsibility of the team, who can of course delegate it to a third person. Standard of the URL is [www.ubforum-\[country\].eu](http://www.ubforum-[country].eu), which is to be followed due to branding purposes.



The non-personal **e-mail** address of the Forum can be created under the organising body's servers. For example, in Finland the e-mail address was [ubfhelsinki\(at\)haaga-helia.fi](mailto:ubfhelsinki@haaga-helia.fi).

All the team members should have access to the e-mail account, to guarantee efficient reply time to messages. It is wise to agree on areas of responsibilities within the e-mails – who answers to what kind of messages.

Please check the properties attributed to the secondary (non-personal) e-mail address. For example, how many people can access the account at the same time, without confusing the system and causing a message loss.

Sometimes the emails sent from non-personal accounts end up to spam or junk folders, especially if they are sent to multiple people at once. If you do not get a reply from e.g. a speaker, make sure that he or she has received your mail.

After the Forum

After the event is officially over, some of the most important tasks of event management still need to be completed.

A proper debriefing should be held depending on your schedule, either after finishing with the event shutdown; cleaning and reorganising the venue back to how it was before, or right after the guests have left the venue.

The debriefing between all the staff members gives a picture of what was done right and what should have been handled better; all of this information will help to improve one's own performance and the prospected future organisers.

Even though the event itself is now over, completing the communications plan should not be forgotten. Sending out thank you letters and reminding about giving feedback et cetera, is an important element of acknowledgement and it shows that the participants and speakers are still being thought after.

Debriefing

A proper debriefing should be held immediately after the event. Depending on your schedule, either after finishing with the event shutdown; cleaning and reorganising the venue back to how it was before, or right after the guests have left the venue.

The debriefing gives a picture of what was done right and what should have been handled better; all this information will help to improve one's own performance and the prospected future organisers.

When giving and receiving feedback, remember that what is done is done and cannot be changed anymore. This is the chance to learn and improve.

With the EC team

Spare some time to sit down with the EC team members right after the official programme has ended. If possible, involve future organisers if they are present.

The EC team and the team should go through the programme step by step together, discussing what worked and where was space for development.

Monetary matters and the process of sharing documents and needed materials should be agreed on.

Reserve some time in the end to go through other possible matters. Do not forget to keep up the communications until all the post-event tasks agreed have been completed.

With other staff members

The debriefing within the other staff members and the Operational team could be done during the following days, if there is no time on the last day of the event. If it is not possible for everyone to gather together afterwards, then the briefing should be held right after the last day of the Forum.

With the other staff members, the team should discuss the Forum days in overall.

- Have time for questions and possible feedback
- Go through the run sheet briefly; were the tasks followed and was there something that should have been improved?
- A separate feedback form for other staff members could be created

The possible volunteers should receive certificates of participating in the Forum, to put on their CV's for future work opportunities. This of course applies for other staff members as well, if they wish to have a certificate as a proof.

Within the Operational team

Within the team, go through the matters discussed with the EC team, have some time for feedback to each other and go through the organising process as a whole. Divide post-event tasks, to ensure that they will be completed – try to share the pictures and other materials with the participants and speakers as soon as possible.

Communications

The final plan on post-event communications with the EC team need to be agreed on during the debriefing. Make sure to complete the remaining tasks and that all the information they need will be sent to them.

Thank-you letter

A thank you letter should be sent to speakers, moderators, rapporteurs and facilitators as well as to sponsors, members of the steering group and other possible partners. A separate message needs to be sent for the participants as well.

Start drafting the above-mentioned letter immediately after the event, or even better, prepare it beforehand. It can be sent by e-mail or for speakers even as a letter.

The content can be simple; thank the participant, mention something memorable that happened during the event, and add statistics on how many participants there were. Thank speakers for them for their presentation and contribution to the Forum.

You can add a personal touch to each letter by addressing recipients by name. For participants this is not necessary, but if you will be using a software that imports data like names easily, it is a nice idea.

Thank you letter to participants should be sent the same time as when to speakers – within one week after the Forum. The same message can be sent out to everyone at the same time, for efficiency reasons, and it can be just an e-mail.

Sharing pictures and documents

The pictures taken at the event should be shared with the Forum participants and contributors. It is advisable to instruct the photographer to go through the pictures as soon as possible, and share them with the Operational team.

It is recommended that the Operational team takes a quick look over the pictures before publishing them. In some cases, there could be speakers that do not wish to be seen on the pictures, or do not want pictures showing their presentations published.

The pictures can be published on any platform. Speaker presentations could be shared with the participants as well, depending on if the speakers wish to give them for distribution.

Sharing the most important documents with the EC team is required. They will be used for evaluation and improving the future Forums, as well as for the report written by the official note takers.

Some of the most important things to be handed over to the EC:

- ⇒ Full access to all registration details
 - List of participants with contact details
 - List of speakers with contact details
- ⇒ Completed evaluation forms received + access for online version is applicable
- ⇒ Session handouts/presentations
- ⇒ Samples of printed out documents
- ⇒ Link to photographs – both print and web quality
- ⇒ Conference report from note takers

Practicalities

Accommodation arrangements

It is recommended to start the process of pre-booking hotels latest six to eight months prior to the forum. The task of the Operational team is to find the hotel and negotiate rates - the EC will continue from that. Please refer to the budget when looking for speakers' accommodation.

Accommodation costs for speakers will be covered by a travel agency contracted by the EC. You should negotiate accommodation for all the speakers from one hotel only. After the EC has accepted the room rates and the hotel, the pre-booking is signed by the EC.

Remember that participants are responsible for their own accommodation arrangements. This should be mentioned clearly on the website, to avoid any confusion. The team has no responsibility on booking, confirming or cancelling participants' accommodations.

Nevertheless, it is advised that special rates for the participants are negotiated, from the hotels of the Operational team's choosing.

Find guidelines for accommodation process below:

- 1 • List all the requirements that the accommodation venue needs to fulfil
 - e.g. distance, capacity, facilities, services, room rates
- 2 • Seek for suitable hotels from closeby and start sending offer requests to the hotels
- 3 • After receiving the offers, clarify cancellation deadlines
- 4 • Forward the offer from the speakers' hotel to the EC
 - On approval: deliver the contact details of the hotel fo
 - On disapproval: suggest another one
- 5 • If special rates have been negotiated for the hotels intended for the participants, remember to market them via your channels, e.g. Twitter, Facebook

Catering

The procedure with catering depends on your contract with the catering team. The following guidelines are based on the situation that the volunteers are helping out with catering. The tips below can naturally be used as a checklist whilst observing the situations.

When preparing the food and drinks, keep in mind that the conference programme might end earlier, thus the food should be ready a good time before the actual beginning of a break.

When it comes to queuing for food, people most likely move like herd and follow others. When having multiple starting points, make sure that people are guided evenly to each. Setting drinks away from the food table helps people spread more evenly after filling their plates.

Have cleaning equipment and napkins ready close by and clean up spills and food on the floor immediately. Napkins are useful to have around in case someone spills drinks or food on their clothes. Have spare table cloth so that you can change the dirty ones after the break ends.

Make sure that you have enough staff cleaning the empty dishes from the tables. Keeping a tidy dining area is important. This also makes space for new set of eaters.

Try to see that there are no outsiders queuing or eating and instruct the volunteers and other staff, that they are not allowed to eat whilst the participants and contributors are eating. Depending on your contract with the catering – do you have separate meals for staff and volunteers or not – you could share the excess food with the staff after the breaks are over.

Instructions

Coffee and lunch breaks should be included in the programme. These will also be complimentary for the participants. Discuss the budget and overall conditions with the EC. If the meals are not included on the event venue contract, the team is responsible for hiring a catering company.

Typically, there are two coffee breaks and one lunch break during the first day, since this is the longest day. On the second day one coffee break and lunch break are enough, unless the official programme lasts for another whole day.

All the breaks should last for at least 20-30 minutes each. If you plan to have more than 100 participants, reserve a minimum of one and a half hours for lunch

Food should be something that is easy for the participants to eat standing, especially if there will not be place for everyone to sit. The space of the lunch area sets the frames for the type of the food and the amount of the dishes.



Picture: Lunch setting in Austria (2016)



Picture: Some dishes from Finland (2016)

Conference packages

Each participant should receive a conference package upon registering on arrival. The package content could be split between a folder and a bag. It is recommended to ask the giveaway items from possible sponsors and partners.

Try to avoid unnecessary and unrelated items and materials to reduce the environmental impact – it is of no use if most of the materials are thrown away immediately.

Ideas for the folder: programme, name badge, dinner invitation and feedback form. If applicable, a list of participants and personalised schedule for each participant could be a nice touch to add. When going for a personalised folder, it is a good idea to mark them with the names of participants to avoid them getting mixed.

Ideas for the conference bag: tourist maps, other important brochures and information, and possible other miscellaneous items from sponsors, e.g. pens, candy, notepads, and other accessories.



Conference venue

The decision upon the chosen conference venue will be done by the organisers in co-operation with the EC. After the team is made aware of the venue, it is important to map out the suitability and capacity for the Forum.

The venue should have at least one auditorium-type space and preferably multiple smaller spaces for other types of sessions. Keep in mind that there should be enough space for registration and info desks. For the most part, the programme determines the choosing of the venue and the spaces.

When choosing the venue, pay attention to the following:

Accessibility	Location	Equipment	Services
<ul style="list-style-type: none">• Disabilities• Stairs• Elevators• Doors• Bathrooms• Spaces	<ul style="list-style-type: none">• Bus, tram, train• Taxi• By foot• Hotel locations	<ul style="list-style-type: none">• Tables/chairs• Wi-Fi• Projectors• Computers• Translation• Microphones• Speakers• Interpretation	<ul style="list-style-type: none">• Catering• Staff• Security• Cleaning• Cloakroom

Cloakroom

When arriving to the venue, cloakroom will most likely be the first stop for the participants – this is of course dependant on the time of the year.

If this is the case, you need to keep in mind that people form first impressions in just a few seconds - if the staff is not polite or welcoming, or there is a long queue, it does no create a good first impression of the event.

Most of the people will arrive to the venue less than half hour before the official programme begins, and leave immediately after it ends. The start and end of the day will be the busiest, so assign enough manpower to make the cloakroom work smoothly.

In wintertime people will be wearing thicker coats, so it is important to have a cloakroom that is big enough. During summer time the cloakroom will not require that much of space since, unless the weather is bad.

It could be that some of the speakers and participants arrive straight to the venue, so you must also have a secure and guarded space for storing the luggage.

Remember, that the cloakroom should not be left unguarded.

Registration desk

You should plan the registration desk carefully, starting from the visual signage leading to it. If the event venue is complex or the desk cannot be seen immediately upon arrival, think about informing about the location in communications before the event.

It is recommended to have separate registrations for participants and speakers & other contributors. The registration for speakers serves the same purpose, but is more tailored as they may have specific need related to their presentations.

To make the process pleasant, all the materials should be arranged in a logical order. Depending on your process, think about the order of what kind of information will you need to receive from the participants arriving and what will you need to give to them.

Below you can see a simple sketch to inspire on how to organise the desk. In this setting,



Picture: Registration desk in Finland (2016)

first comes asking for the name of the person, and after that she or he will receive the name badge and a conference folder.

The name badges are on the table in alphabetical order as well as the conference folders, boxed under the table. The name badges could also be attached to the folders, so that they do not mix up.

Other items to have could be

- lists of participants for all activities
- laptops with internet access; have all the important documents and websites open and ready
- printer for printing out new or lost badges
- event folder for staff (see separate chapter)
- brochures from organisers and office supplies.

Arrange space for other miscellaneous items like handbags, spare folders and chargers for laptops and phones.



A high registration desk looks more professional and it is more convenient for people since they do not need to bend down to pick up items – try to get tables that are high enough for this. When staff are standing up and not sitting down, they look more efficient, and it is easier to create eye-contact with the person on the other side of the table.

Have a complete list of participants with some empty space at the end for details of walk-ins. Mark down all the arrivals clearly to keep track on participant numbers!

Room setting and visual guidance

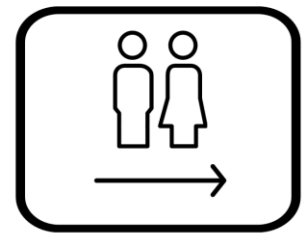
Get familiar with the venue and pre-book rooms, in case you will not be using the whole venue. In both cases, you still need have an idea of the possible spaces and

their capacities, for an example lunch area, speakers' lounge, workshops, and plenary sessions.

Make a plan for the set-up of the spaces before the event, to get to know if there is enough furniture like tables and chairs. It is recommended to try the arrangements before to see how they work. Think about different kinds of settings, not just the traditional ones, to make the session(s) more interesting for both, the speakers and the participants.

After deciding on the spaces, plan on how to guide the participants at the event venue. Walk the customer journey – how would they navigate around at an unknown venue?

When the customer journey has been gone through, plan the need for visual signage. Remember, that the participants do not know the layout of the venue, so it is good to have clear visual signage to all the spaces, bathrooms and lunch area – rather too much than not enough.



It is advisable to have a map the event venue available at multiple locations. Especially if the event will be held in multiple spaces and floors, or the venue itself is large or like a maze.

Event folder

The idea behind the event folder is to gather all the important documents for the staff and organisers in one place, so that they can be found and accessed easily. This folder could be located at the registration or information desk as an actual folder, or online. The event folder should not be accessible for outsiders.

Examples of some of the most important documents:

- Run sheet
- Emergency plan
- Security contacts
- Phone numbers of staff and volunteers
- Other crucial phone numbers

- E.g. hotels, taxis, waste company, janitor, emergency centre, catering and dinner restaurant
- Blueprints of rooms
- Copies of registration lists

Feedback questionnaire

Collecting feedback from participants is useful for the development of the future Forums, thus every Forum organiser is asked to do this. Receiving feedback will also let you know what went right and was there level for improvement.

The shorter and simpler the questionnaire is, the inviting it is for the participants to fill out. Try to keep the questions short and answer possibilities simple. The EC team members will most likely wish to influence the content of the survey.

Any tool can be used, but if the questionnaire will be online, it is wise to use a software the EC team members can access later. Below you can see the questionnaire from Helsinki (2016). The questionnaire was created online by using SurveyMonkey. Printed out versions created by another programme, were distributed as well.

You can use various channels for distribution, e.g. by implementing online survey at the event, handing out printouts, sending via e-mail, or posting it to your website and social media accounts.

Thank you for attending the Thematic University-Business Forum in Helsinki. Your opinion and feedback of the Forum are highly appreciated and used for the further development of the Thematic University-Business Forums. Please take a few minutes to fill out this feedback questionnaire.

* 1. Sector you represent

- Higher education
 Policy and administration
 Business
 Other

* 2. How did you learn about the Thematic University-Business Forum, Helsinki?

- From the European Commission
 From the local organiser Haaga-Helia University of Applied Sciences
 From a colleague/friend
 From another source, please specify:

* 3. Please rate the panel discussion and breakout sessions you attended on Thursday

	Excellent	Met my expectations	Partially met my expectations	Did not meet my expectations	Did not attend
Creating a fertile ground for business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learn to create	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connect the dots	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Build roots	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spread your wings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* 4. Please rate the panel discussion and breakout sessions you attended on Friday

	Excellent	Met my expectations	Partially met my expectations	Did not meet my expectations	Did not attend
International talent - business potential	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Learn to create	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Connect the dots	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Build roots	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Spread your wings	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5. Name the presentation that you found most interesting and valuable for you. Why?

* 6. Please evaluate the pre-information about the topic and contents of the Forum given on the Forum website

Excellent
 Useful
 Quite useful
 Not useful
 Did not visit the website

* 7. Please evaluate the pre-information given about practical arrangements, i.e. accommodation, arrival, instructions, venue, on the Forum website.

Excellent
 Useful
 Quite useful
 Not useful
 Did not visit the website

* 8. Would you consider joining Thematic University-Business Forums again?

Yes
 No

* 9. How would you rate the event as a whole?

Excellent
 Met my expectations
 Partially met my expectations
 Did not meet my expectations
 Do not know

10. Please share any other comments or ideas you might have:

Next

Powered by

 See how easy it is to create a survey

Printed programme

The design of the printed programme should be visual so that it is simple and easy to read. The extent of the information in the programme is highly dependent on how eco-friendly or detailed you wish it to be; less content means less paper is needed.

Below you can find items to consider placing to the printed programme:

Mandatory	Optional
<ul style="list-style-type: none"> • Programme with case titles and speakers' names • Welcome words • Address(es) of the location(s) • Logos of the EC, organisational body and sponsors • Emergency number 	<ul style="list-style-type: none"> • Position/organisation/company of the speaker or contributor • Detailed information about the sessions/cases • Wi-Fi code • Taxi numbers • Pictures of the speakers • Map of the venue • Social media accounts, hashtags

See below for the **cover pages** of the programmes from Austria and from Finland.



LOGOS: The logo of the EC should be clearly visible. Include also logo of the Forum and ones of sponsors and partners.

Registration

Participants

Any kind of an online registration tool can be used for registration. Tool that can be embedded to the webpage is recommended, the less “clicks” needed to be pressed whilst surfing on the website, the better.

The registration should be opened as soon as the core programme with theme and descriptions has been developed and most of the speaker profiles are published, but at least three months prior to the Forum.

Below you can see what should be included in the registration. If you wish to add optional questions, be sure that you will need the data from them.

Mandatory	Optional
<ul style="list-style-type: none"> • Mr/Ms & possible title • Names • Nationality or current residence • E-mail address • Position & organisation/company • Sector (higher education, business, policy & administration, other) • Food restrictions/preferences 	<ul style="list-style-type: none"> • Home address • Phone number • Participation on side activities • Arrival and departure dates • Accommodation

After signing up successfully, the participant should receive a confirmation message. The message should include the contact details of the team, links to social media and website, reminder to check the website frequently and to notify in case of cancellation.

Think carefully, for what the collected information is used for and will it be useful. The less unnecessary information there is collected, the easier it will be going through the data.

If the confirmation e-mail does not include a link that can be used for cancelling, send out a message approximately two weeks prior to the event, kindly asking to notify you in case of cancellations. This has proven to lower the no-show rate; in Finland (2016) the no-show rate was less than 20%.

Some participants may need a visa to enter the country of the Forum. Be prepared to provide them with a letter of invitation to the Forum.

If you wish to publish the list of participants, remember to ask for permission in the registration form!

Speakers and other contributors

Depending on the registration tool and management style, the speakers could either use the participant registration, separate registration created only for them or an e-mail requesting the needed information could be sent to them.

To ensure a better answer rate and to smooth out the data exchange with the travel agency, sending out personalised e-mails is possibly the most effective way.

At least for the following should be asked for:

- ⇒ Mr/Ms & possible title
- ⇒ Names according to passport/ID card
- ⇒ Starting point of travel
- ⇒ Home airport (if applicable)
- ⇒ Preferred itinerary
- ⇒ Dates when accommodation is needed (if applicable)
- ⇒ E-mail address (Cc e-mail if applicable)
- ⇒ Participation in the Forum sessions and side activities

Name badges

The process of creating name badges can be started already a week prior to the event from the existing participant and speaker lists. After the template is made, only the necessary details need to be added.



There is software for importing information from Excel straight to the template. Bigger conference centres and organisers have specific machines and software to create badges and print them out in no time.

Badges for staff and speakers should differ from the participants' badges, using for an example a colour code, to recognise them easily.

If possible, mention on each participant's badge (or folder) to which programmes they have signed up for - they probably do not remember these.

Social activities

Dinner

The dinner is offered by the EC as a compliment for the participants and speakers (latter prioritised). The dinner costs should be included in your budget done at the very beginning.

The process of looking for a suitable dinner venue should be started approximately eight months before the Forum.

To create an element that touches and moves, it is recommended to take the participants out of the dinner venue to see other parts of the city, and to experience local dining experiences. Things to keep in mind when seeking for restaurants, are distance, accessibility, capacity, facilities, and type of food.

1

- List all the requirements that the dinner venue needs to fulfil

2

- Seek for the suitable restaurants and start sending offer requests

3

- After receiving offers, choose one and forward the offer to the EC

4

- On approval, book the dinner venue and connect them with the EC and the travel agency. Otherwise suggest another venue

6

- Create two lists of dinner attendees: Speakers/VIP and participants
 - > Are there cultural differences?
 - > Do you have seating plan?



Picture: The dinner venue of Austria

It is advisable to set a limit on the number of dinner participants. It is easier to control the costs of the dinner, when a target amount is set: arranging and setting the costs for an occasion for 200 people is easier than for an occasion where the number of participants are unknown.

By including dinner participation in the online registration, you can keep track on approximate attendee numbers. Due to the occasion being free of charge for the participants, a moderate no-show percentage can be anticipated (20% - 25%).

If the dinner is planned so that there is a seat for every participant and guest, it is advisable to ask for confirmation in some form. If the dinner participants do not need to commit in any way, it is impossible to estimate the no-shows.

Each speaker and contributor should be asked, if they wish to attend the dinner, so that you can prioritise them if there is a set limit.



Pictures: The dinner in Finland was held in Restaurant Saari, which was located on an island just outside the Helsinki city centre

Side activities

You can get suggestions on the social activities from the previous forum's programmes.

Sightseeing could be arranged after the official end of the forum programme. The team has open hands on this, so it could be almost anything; but keep in mind the feasibility, weather conditions and target audience.

If working in cooperation with a higher education institution, an example task for the students could be to plan and implement social activities, like sightseeing.

Most likely these activities are not included in the budget, so the participants are responsible of their own costs. This should be mentioned clearly on all of the materials about regarding the activities.

Many participants have interest to explore the city, but due to these activities being optional, a high no-show percentage can be anticipated. The participants might also change to another activity, without informing about the change.

It is wise to take enrolments to the activities already on the online registration. To reduce the no-show percentage and getting attention from participants who have not enrolled, it is good to:

- ⇒ Ask for confirmation of attendance in the beginning of the Forum
- ⇒ Have advertisements on the activities at the registration desk
- ⇒ Have a list at the registration desk where people can sign up during the event

Speakers

Call for speakers

Sending out a call for speakers could be one way to kick-start the search of the speaker candidates. Call for Speakers gives the opportunity for individuals or organisations to send you proposals to speak at the Forum.

This message should be maximum of one page, explaining the purpose of the Forum, the theme, background information, and participant statistics of previous Forums. It should also tell what type of speakers and cases you are looking for.

Remember to mention that the travel and accommodation costs will be covered by the EC, but otherwise no separate fee will be paid (pro-bono).

Biographies and photographs

The attributes for the biographies and photographs need to be decided upon before starting to collect them. Things to take in consideration are: For what will they be used for, where will they be published, how much available space you have on the website servers, et cetera.

A recommendation for the biography is about 250 words in text form in English. Preferably not a CV listing – something interesting that the participants would want to find out. If found important, give the speakers more detailed, e.g. mention only the most important job and project experiences, try to include something about your hobbies, or describe your career path shortly.

The attributes of the picture depend on for what it will be used for. A picture with 72 dots per inch (DPI) should be enough for a website and for printing, but printing might require one with 300 DPI. If a horizontal photo would fit the webpage better, it should be mentioned as well.

Detailed briefings for the speakers

Confirming all speakers might continue until the last moments before the Forum. The closer the event gets, the more instructions and information the speakers need to be provided with.

Please find below examples of matters that need to be included into to the communications with the speakers, facilitators and moderators:

1. Pictures and biographies
 - Start collecting approximately two months before
2. Contact, travel and accommodation information
 - Start collecting approximately two months before
3. Information about the Forum
 - Throughout the communications
 - Closer to the event, inform about the setting and technical equipment
4. Presentations
 - Start inquiring approximately a month before
 - Ask for sending presentations before the Forum

- Ask if it is possible to share the presentation afterwards with the participants

5. Connect the speakers

- Earliest three weeks before
- Team up the speakers with the facilitators and moderators (if necessary)
- Team up the panellists with the moderators
- Team up the rapporteurs and the facilitators
- Let rapporteurs know that professional note takers will be present

Communications need to be very compact. The speakers might not read the messages thoroughly, if they are too long and complicated

If simultaneous interpretation will be arranged, draft presentations should be sent in earlier, so that the interpreter(s) can prepare themselves

Kindly notify the speakers that the presentation time is not for vendor pitches. A case study that demonstrates the expertise of the speaker, can work as good illustration, but the division between this and a vendor pitch is very thin

Detailed briefings for the overall moderator(s)

Since the overall moderator(s) oversee running the plenary, they need to be prepared accordingly. Knowing the speakers, the programme and the minute schedule (run sheet) in details is the key to successful time management.

The moderator should try to get to know the panellists beforehand, even just by a brief information search via internet. The biographies provided by the Organising Team are most likely short and do not contain much insight.

The moderator is also responsible of preparing his or her own notes, and the questions that will be asked from the panellists! Preparing the questions requires proper research of the topic.

During the panel discussion(s) the moderator is to introduce the speakers, ask the questions, set the pace and maintain some control, so that the discussion stays within

the topic. During the session(s), the main task of the moderator is to introduce the speakers.

Here are some materials that the moderator(s) should be provided with beforehand:

- Information about the Forum in a nutshell
- Biographies of the speakers
- Description of the panel discussion topic(s)
- Detailed schedule for all the sessions (run sheet)
- Manuscripts
 - ⇒ Short welcoming words
 - ⇒ Introductions of the speakers
 - ⇒ General information that needs to be communicated to the participants
 - ⇒ Short thank you-words
 - ⇒ Note: Making more in-depth notes regarding the topic and the speakers is the responsibility of the moderator(s)

It is important for the moderator to keep track of time. Making sure that no panellist drags on for too long, and that there is enough time for discussion in the end

Sponsorship

To cover a part of the organising costs, one idea is to look for sponsors. Take in consideration the existing partners and/or look for companies and organisations that would be interested in promoting themselves in a conference like this.

Before starting the process, identify how the organisers and the sponsor benefit from the partnership, and create a plan of how you will sell the event and what you could ask from the potential sponsors.

1

- Have a list of what you could offer to the sponsors, and what you expect from them

2

- Search for prospect companies or organisations

3

- Contact the person responsible for marketing, or use existing partner contacts

4

- Keep track of the representatives contacted. Mark down their responses and offers

5

- Sponsors on-board: Discuss the quantity of products, delivery, pick up, and if applicable the details of sponsor's stands

The sponsors could provide you with materials for the conference bag; pens, notepads, screen wipers, candy, water bottles, or other miscellaneous items. Try to think about this from the perspective of the attendees – would you use the items in the future?

Besides marketing companies and organisations on the conference materials, another option could be straight monetary support, to get the logos displayed in e.g. Forum marketing materials.

You could query for other practical items like name badge holders, lanyards or badge reels or gifts for speakers.

Staff briefing on event days

Each of the Forum days should start with a staff briefing where all the staff members gather together. This is the time to go through the running order of the day, inform about possible changes and answer for any questions.

By having a moment where everyone is gathered together, it is easy to control the attendance of staff; in case someone is missing you have a chance to delegate the tasks to someone else. If there the group of staff members is big, the briefing could be split by teams and held by their team leaders.

Important questions to which the staff and volunteers should know the answers are for an example:

- ⇒ Overall Forum schedule: sessions, times and locations
- ⇒ Frequently asked questions about the city/location
- ⇒ Locations of cloakroom, pharmacy, bank automat, taxi stand
- ⇒ How to get to airport, train, city, hotel...
- ⇒ What kind of sightseeing destinations there are close by?

Technical equipment

Training on how to use the technical equipment should be very thorough. This part is still most likely the one that fails the easiest.

If you have arranged the presentations into one file, make sure that the change between presentations can be done smoothly. When the speakers shift, ensure that the next speaker is prepared and has the microphone ready.

Make sure that staff have memory sticks available, in case some files need to be moved et cetera.

Speaker presentation slides

Be prepared for the fact that most of the speakers will not send their final presentations beforehand and will bring them with them. There can be speakers who do not wish to share their presentations. You need to respect their wishes.

Going through all the presentations before the event is recommended. If the presentation contains embedded video or audio, test them before the actual presentation.

Check what aspect ratio do the projectors require. Some of the projectors might not work with both 16:9 and 4:3, so you need to be precise when instructing the speakers.

Ask for the speakers to arrive some time before their session(s) start so that they can go through their slides and if needed, you can still make some changes and fixes.

If you have not received the presentation in advance, make sure that you save a copy of the presentation for your files so that it can be made available after the Forum on the Forum website – providing the speaker allows the presentation to be shared.

Kindly notify the speakers that the presentation time is not for vendor pitches. A case study that demonstrates the expertise of the speaker, can work as good illustration, but the division between this and a vendor pitch is very thin

Cables and adapters

Make sure that you have all the necessary cables for your own technical equipment – computers, laptops, projectors, printers and other. Besides those, you should have some extra cables as a backup and for the devices of the speakers.

You can expect that some of the speakers want to use their own devices so try to have as many different cables and adapters as possible. It is important to inform the speakers about the technical equipment available before the Forum, so that they can be prepared.

If there are many cables and wires on one table, the staff needs to know which ones to use to which screen or device. Some auditorium settings have the possibility to plug in multiple devices, which can then be controlled from one main unit. Make sure that there is a technician available close by.

Microphones, pointers and slide changers

When informing the speakers about the technical equipment available, you should let them know about the microphones, pointers and slide changers available.

It is important to instruct the speakers on how to hold and use the microphones, to ensure that they will be heard.

Headset microphones should be used if possible, so that the speakers will have their hands free. If possible, the microphones should be wireless to allow moving around

while speaking. If a lectern is used, ask if the speaker wishes to use the built-in microphone or another one.

It is recommended to have slide changers so that the speakers can change their slides by themselves without standing next to the presentation laptop/desktop. Having a staff member changing the slides does not create a professional look and in most of the cases does not work out at all. Slide changers do not normally work on Prezi nor on PDF.

A pointer can be built into some types of slide changers, but if your models do not have this feature, it is good to have a few of them available separately. Some speakers might wish to use this to point out specific parts of their slides.

Test all the devices and audio a good time before the event. Think about different possible technology related ad hoc situations and go through how to solve and react to them.

Interaction during the Forum

To increase the level of audience engagement, it is recommended to use at least one type of a communications tool or an app. This does not have to be used on one of the sessions, but for an example during a panel discussion to enliven the conversation.

The organisers have free hands on what kind of tool can be used, even [Twitter](#) works fine, but you can find examples from below.

In Finland (2016), two types of communication tools were used: a standard message wall and a game-like tool Kahoot!. To learn more about, and to create a Kahoot! game, visit www.getkahoot.com.

If a message wall is used, it should have a moderator that is aware of the subject or the case and can choose the right kind of messages or questions. Having messages like "Happy birthday mom!" does not create a professional look.

If an application is used, it is important to consider if it will take too much of the audience's attention away from the speaker. Applications should not be used just because they should be used.

Time management

The most important task during the presentations, besides ensuring that the technical equipment works, is to stay on schedule. This responsibility lies on the hands of the

- Overall moderator(s) during plenary sessions.
- Facilitators during the workshops

Time management starts already from the moment when people are asked to move to the space(s) where the programme starts or continues. If the customer journey has been walked carefully, it should be able to calculate how long it takes for X number of people to move into the space(s).

A common way to announce the starting of a programme is to ring a bell or a buzzer. It is recommended to prepare for more than one announcement, since there are always people who do not react to the first one.

Moderator(s) and facilitators will start the programme by introducing the speakers and representatives. They also handle the small talk between the cases. By doing this they will have the control of when to begin the programme. It is polite to wait until every one has taken a seat, but if it seems that there will be a big delay, starting to talk could be used to hurry people.

During the presentations, the other staff members in the room can help with the time tracking by showing the time left that the speaker has. If it is not possible to have a countdown timer that shows the speaker the time left, signs like "two minutes' left" and "one-minute left" could be used.

If it seems that the speaker will go overtime, the moderator needs to politely interrupt him or her and move on.

Run sheet

Creating a run sheet is not compulsory, but is highly advisable from the event management perspective.

Run sheet is a document that describes each and every thing that needs to be done per each day of the event. This document is very important during the event days, especially if there are multiple things going on at the same time and multiple staff members working at the same time.

Creating a run sheet also helps you to go through the event days precisely; it is easy to run through the event when you have been thinking about all the tiniest details multiple times before.

There are always things that are forgotten during the planning process, like: who was going to be the one opening the doors of the auditorium from outside? By trying to take each and every thing that happens around the venue into account, you hopefully will lessen the number of forgotten things.

Start drafting the run sheet at least a week prior to the event, by using for an example Excel. A very precise run sheet can have over 200 rows for only one day. Find inspiration for the run sheet below:

Programme	Time	Task	Location	Details	Responsible	Assisting
	7.00	Doors open	Lobby	Smile and greet	Name	Names
Opening words	8.00		Auditorium		Name	
		Assist the speaker	Auditorium	If needed	Name	
Coffee break	9.00		Lobby		Name	
		Guide people	Lobby	4 starting points	Name	Names
		Help cleaning up	Lobby	Block to space 2	Name	Names

Background information

European Commission

European Commission (EC) is the executive body of the European Union (EU). Its office is located in Brussels, Belgium. The EC represents the interests of the European Union as a whole, but not the interests of individual countries.

It is formed by a team of Commissioners, 27 members – one from each European country. These members are chosen by the President of the Commission, who is elected by the European Parliament, based on suggestions of the member states. Each team will work for five years and then the members change. The European Commission is responsible for proposing legislation, enforcing European law and working as a guardian of EU treaties (European Commission, 2016).

The EC is divided into several departments known as Directorate-Generals (DGs). The specific department in charge of organising these forums, is the DG in Education and Culture” (EAC). Their responsibilities lie within policy on education, culture, youth, languages and sport, by also supporting these issues via projects and programmes. (European Commission, 2016).

EC supports links between universities and businesses at the European level, therefore they have started a project called University-Business Cooperation. The EU Forum for University-Business Dialogue has been established under this project.

Thematic University-Business Forum

There are two types of Forums: an EU-level University-Business Forum (UBF) that was established in 2008 and is held annually in Brussels and Thematic University Business Forums that are organised several times a year in cooperation with Member States.

The Thematic UBFs focus on varying themes in areas surrounding the Member State where the event takes place at. These events last normally one and a half days and offer opportunities for representatives of higher education institutions, companies,

business associates and public sector to network, promote new practices and learn from each other.

In year 2014 there were altogether four Forums, 2015 one and in 2016 three: Austria, Finland and Spain. The Forum in Helsinki was the eighth forum to be held.

The Thematic University-Business Forums are free of charge for the participants and typically suggest optional social activities, dinner, and sightseeing. The speakers will arrive pro bono, but their expenses such as travel, accommodation, and meals are covered by the EC.

Specific vocabulary

Allotment hotel = A hotel from where you have pre-booked rooms based on their offer

e.g. = For example – “*exempli gratia*”

EU = European Union

EC = European Commission

DG = Directorates-General – departments to which the EC has been divided to

DPI = Dots per inch – how many dots a printer prints per inch

EAC = Education and Culture – one specific EC department

i.e. = That is – “*id est*”

Pro bono = Professional work undertaken voluntarily; without charge

UAS = University of Applied Sciences

UBF = Shortened from University-Business Forum

Sources:

European Commission, 2016. Accessed: 14 May 2016
http://ec.europa.eu/about/index_en.htm

Thematic University-Business Forum, Helsinki www.ubforum-finland.eu (Accessed 5 March 2016)

Thematic University-Business Forum, Austria www.ubforum-austria.eu (Accessed 14 March 2016)

Thematic University-Business Forum, Vilnius & Kaunas www.ubforum-lithuania.eu (Accessed 4 April 2016)

Thematic University-Business Forum, Berlin www.arbeitgeber.de/www%5Carbeitgeber.nsf/id/en_university-business-forum (Accessed 29 May 2016)

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Materials to be created in a nutshell

Here is a list of some materials and documents to be created, alphabetically and in a nutshell. You can use this as a checklist, please do not forget to add materials that might be missing.

- Budget
 - ⇒ Estimation of all costs
- Call for speakers
 - ⇒ Searching, inviting, engaging
- Communications and marketing plan
 - ⇒ What, when, who in for an example one big Excel table
- Conference folder
- Conference package
 - ⇒ Bag or folder, or both

- Conference timeline
 - ⇒ Compact timeline on the major tasks from the beginning to the end
- Confirmation email
 - ⇒ Sent after participant registers
- Event folder
 - ⇒ All important documents needed during the event
- Feedback questionnaire
 - ⇒ Experiences, opinions, suggestions for improvement
- Fliers and handouts
 - ⇒ According to your strategy
- Instructions for speakers (and other emails)
 - ⇒ According to your strategy
- Logo
 - ⇒ Knot theme
- List of speakers for the travel agency
 - ⇒ As instructed by the EC team
- Name badges
 - ⇒ For staff, participants, speakers, et cetera
- Posters
 - ⇒ According to your strategy
- Printed programme
 - ⇒ According to your strategy
- Registration form example
 - ⇒ For participants and if needed separately, for speakers
- Run sheet
 - ⇒ Each task that needs to be completed during the forum
- Thank you letter
 - ⇒ For participants and speakers
- Website
 - ⇒ According to your strategy