



A guide to conference organization for Rotex International

Julia Töytäri

Haaga-Helia University of Applied Sciences

Bachelor of Business Administration

Bachelor Thesis

2023

Abstract

Author(s) Julia Töytäri
Degree Bachelor of Business Administration
Report/Thesis Title A guide to conference organization for Rotex International
Number of pages and appendix pages 31 + 25
<p>In this product-based thesis the goal was to produce a guide for a conference organization for Rotex International Convention. Rotex International Convention is a reoccurring international conference that is organized by a member association of Rotex International willing to host the conference in their home region. The organizing team changes each time and is made up of volunteers who do not necessarily have experience in conference organization. The guide is designed to help the organizers navigate the organizing process by offering a broad view of the planning phase. It is aimed to give an inexperienced conference organizer an idea of what they should consider and focus on when organizing Rotex International Convention.</p> <p>Conference organization can be divided into three phases: planning, execution and closing. In this thesis a theory for all the phases is covered but the product only focuses on the planning phase. In the guide theory of conference organization from literature sources has been applied together with information from a promotional webinar "How to host Rotex International Convention".</p> <p>As part of the thesis a strategical analysis of Rotex International Convention was conducted. The analysis helped to define the concept of the conference. Since the conference is organized by volunteers and without any funding, that must be considered in the planning and execution. The main objective of the conference is to strengthen a community by networking and sharing knowledge.</p> <p>The events industry is a large and diverse industry where conferences make up just one part of it. In this thesis a general introduction to the events industry and different types of events is included. A large part of the thesis focuses on the theoretical frameworks of conference organization and on the uniqueness of conferences compared to other events.</p>
Key words Conference, Event Management, Event Production

Table of contents

1	Introduction	1
1.1	Purpose, objectives, and benefits	1
1.2	Relevant vocabulary	2
1.3	Research methods	2
2	Rotex International and Rotex International Convention	3
2.1	Rotex International	3
2.2	Rotex International Convention	3
3	Events and event industry	5
3.1	Classifications of events	5
3.2	Events industry size and structure	7
3.3	The impacts of events	8
4	Conferences as events	10
4.1	Special characteristics of conferences	10
4.2	Value of conferences	11
4.3	Difference between congress, conference, and convention	13
5	Organizing a conference	15
5.1	Phase 1: Planning – Before the event	16
5.1.1	Organizing committee	16
5.1.2	Strategic planning	17
5.1.3	Financial Planning	18
5.1.4	Conference venue	19
5.1.5	Conference program	19
5.1.6	Logistics	21
5.1.7	Marketing, promotion, and publicity	21
5.1.8	Event staff	22
5.1.9	Safety and security	22
5.2	Phase 3: Managing the event	23
5.3	Phase 4: After the event	23
5.3.1	Evaluation	23
5.3.2	Debrief	24
5.3.3	Follow up	24
6	Strategic analysis of Rotex International Convention	25
6.1	5 W's	25
6.2	Rotex International Convention objectives	26
6.3	SWOT Analysis	26

7 Discussion.....	28
7.1 Considerations	28
7.2 Limitations.....	29
7.3 Ideas for improvement.....	29
Sources	30
Appendices.....	32
Appendix 1. Guidebook: How to host Rotex International Convention	32

1 Introduction

In this product-based thesis the objective is to create a guidebook on how to organize the Rotex International Convention. The guidebook will cover various aspects of planning and organizing a conference. The guide is meant to assist the user through the process through information, advice, and examples. It has been created with the assumption that the user is someone without much experience or knowledge on the topic.

Rotex International Convention gathers Rotex members from all around the world to network, share experiences and learn how to develop the community and activities. It is a reoccurring event, taking place every two years in a different location. Rotex International oversees the organization of the conference, but each time it is organized by a local Rotex association whose members create the organizing committee.

In this thesis I will first present some information that introduces the reader to the event industry and events. I will talk about conferences more in detail in chapters 4 and 5. Chapter 5 dives into the organization of a conference and this knowledge was used as a basis for the product. It was applied to be suitable for this conference itself. In chapter 6, I strategically analyzed the conference to form a better idea of the concept, objectives, and needs.

What comes to the terminology of this thesis, conference is used instead of convention even if the name of the event is Rotex International Convention. In chapter 4, the difference between these terms is explained.

1.1 Purpose, objectives, and benefits

The organizers are a group of volunteers who do not necessarily have experience or knowledge in event management. Conference organization is a complicated task so the guide will help them to organize a successful conference without any prior knowledge. Having guidelines and instructions helps to keep the quality of the conference the same every time with changing organizers. The guidebook is meant for assistance and tips when needed, not to be followed exactly.

The main objective is to provide the organizers with a source of relevant information to make the planning of the conference an easier task. This type of guide is needed since the organizers are not required to have experience in event management. The guidebook can also give any interested Rotex association an idea of what it takes to make the commitment to organize the conference. Having this helpful and relevant information available will benefit the organizers by making the process easier and smoother.

1.2 Relevant vocabulary

In this thesis several terms related to the commissioning organization are used, and their meanings are described below for easier understanding.

Rotex – “RYE alumni who actively support the RYE program and its participants.”
(Rotex International s.a.)

Rotex Association – “An organization of Rotex, usually covering the same area as its respective RYE program.” (Rotex International s.a.)

Rotex International – An umbrella organization for Rotex Associations.

Rotary International – An international service organization whose foundations are the local Rotary Clubs that work on doing good within their community. (Suomen Rotary s.a.)

Rotary Youth Exchange (RYE) – “Rotary International’s worldwide youth exchange program. The program is organized at the Rotary district or multidistrict level.” (Rotex International s.a.)

1.3 Research methods

Several literature sources were used in this thesis to cover the theoretical frameworks of conference organization and to get familiar with the event industry. This thesis also includes a strategical analysis of the Rotex International Convention. The aim of the strategic analysis is to get an idea of the concept and main characteristics of the conference.

Considering the characteristics of the Rotex International Convention and the strategical analysis conducted, the theoretical framework was adapted accordingly in the guidebook. The guidebook includes recommendations based on my knowledge. In addition, a recording of a Rotex International’s workshop “How to host a Rotex International Convention” was used to gather some insights.

2 Rotex International and Rotex International Convention

2.1 Rotex International

Rotex International is an umbrella association for all Rotex associations. Rotex associations are formed by previous Rotary Youth Exchange Program participants. They work together with the local Rotary Youth Exchange to enhance the experience of the exchange students. As an umbrella organization Rotex International supports Rotex associations in their work, promotes exchanges between Rotex associations, and works to create uniform representation of Rotex.

Rotary Youth Exchange is part of Rotary International's youth programs. It offers long-term and short-term exchanges for youth aged between 15-19. The main purpose of the program is to promote world peace.

Rotex International connects Rotex associations worldwide through online events and meetings. They help new associations to be started and support existing associations in developing their activities. To achieve this, they gather training materials, and have individual meetings with local associations. Rotex International also wants to ensure that the valuable work Rotex does is recognized within Rotary Youth Exchange Programs and Rotary International.

Rotex International board is made up of five members from different countries that each serve a two-year term on the board. The board elections are hosted every year and follow a staggered election system. Besides the board, there are committees working under Rotex International.

2.2 Rotex International Convention

Rotex International Convention brings together Rotary Youth Exchange Alumni from all over the world to network, share experiences and improve the Rotex community as well as the Youth Exchange program. The main purpose is for the Rotex members to get together and work towards a more unified and developed community.

The main target group is Rotex members, but other participants of the Rotary Youth Exchange program such as Rotarians are welcome to join as well. The conference is organized every two years in a different location. It takes place around the end of July until mid-August and lasts three to four days.

The conference is part of Rotex International's work to develop the community, but the conferences were organized even before Rotex International was established. The conference has been organized four times: 2012 in France, 2014 in Belgium, 2016 in Germany and 2018 in Taipei. It

was also planned to be in Brazil in 2020 but ultimately had to be cancelled due to the COVID-19 pandemic. The next conference will take place in Italy in 2024.

Each conference has had a different main theme around it. The previous themes in order are:

- How to build a Rotex Club
- How to improve Rotex
- Partnership between Rotex club and the relationship between Rotex and Rotary
- The position of Rotex

According to the Rotex International bylaws, the conference is organized and hosted by one or more Rotex associations with the help and support of Rotex International. Rotex International will oversee the scientific program but all the other tasks are the responsibility of organizing Rotex associations.

In each conference, Rotex associations can nominate themselves to become the next host for the conference. In the general meeting, the host will be decided by a vote. The elected Rotex association gathers an organizing committee out of their members who are then in charge of the planning and execution of the conference.

3 Events and event industry

In this chapter I will cover general information about events and the event industry. I will talk about the classification of events with examples and talk about the impacts of events. Also, the structure and size of the event industry is covered.

An event is a planned occasion that may reoccur or happen just once. Events always have some objective. They are also bound to a time and a space that can either be physical or virtual. An event is something that is outside of the everyday routines of its participants. (Tapahtumateollisuus ry. s.a.)

Shone and Parry (2013, 6-7) define special events to be non-routine occasions that have the purpose to enlighten, celebrate, entertain, or challenge the experience of a group of people. They have also defined eight characteristics of events. Uniqueness is the key element of all events. Some events do happen more than once where the format and structure are the same, such as weddings or annual conferences, but each event is still unique. A characteristic closely related to the uniqueness of an event is perishability. An event can never be repeated or recreated in the exact same way it was done before. Though, a certain level of standardization is possible. Events are also characterized by being intangible; an event is something you experience and can have memories of. There are some tangible elements to events such as party favors, foods, and pictures but the event itself is intangible. Other characteristics of events as a service include labor-intensive-ness, fixed timescales, personal interaction, ambience, and ritual or ceremony. (Shone & Parry 2013, 20-22.)

3.1 Classifications of events

Events can be categorized in many ways and there are a variety of different events. Some ways to divide events are public and private events, free and chargeable events, as well as online and in-person events. Looking at the purpose and concept of the events, many other categories can be used as well. Examples of different events are parties, business events, spiritual events, or political events. Under each type of event there are several variations. (Wallo & Häyrynen 2022, chapter 2.1.)

Most often events are categorized by their type, and it is commonly done by using Getz typology of events (Table 1). The eight categories by Getz are cultural celebrations, business and trade, arts and entertainment, educational and scientific, political, and state, private events, recreational, and sport competition. (Dowson & Basset 2018, 3-4.)

Table 1 Getz typology of events (Dowson & Basset 2018, 4.)

Cultural celebrations	Business and trade	Arts and entertainment	Educational and scientific
<ul style="list-style-type: none"> • Festivals • Carnivals • Religious events 	<ul style="list-style-type: none"> • Meetings • Product launches • Trade shows 	<ul style="list-style-type: none"> • Concerts • Performances • Award ceremonies 	<ul style="list-style-type: none"> • Conferences • Seminars • Training
Political and state	Private events	Recreational	Sport competition
<ul style="list-style-type: none"> • Political summits • Royal occasions • State visits 	<ul style="list-style-type: none"> • Parties • Weddings • Family occasions 	<ul style="list-style-type: none"> • Games • Outdoor activities • Adventure activities 	<ul style="list-style-type: none"> • individual/Team • Amateur/Professional • Local/International

Furthermore, events can be categorized by size and impact. Bowin et al have identified four categories of events: local, major, hallmark, and mega-events. Local events are aimed at the local community, and they usually have small attendance numbers and only have impact locally. Major events are large in number of participants. Major events have significant impact drawing the attention of the media and attracting visitors outside of the local region, which boosts the local economy. Mega-events are the largest in size and impacting billions of people. They attract visitors internationally and get the attention of the TV audience as well. Hallmark events' names are often synonyms with the name of the city or region where it takes place. When a specific place is identified by an event that is organized there, the event is referred to as hallmark event. (Dowson & Basset 2018, 4-5.)

There are also other ways to categorize events. One way categorization is by frequency. A company can have yearly celebrations, sales meeting every half a year, monthly staff awards and daily team meetings. Geographical categorization is also possible, sporting events being a good example. There are national competitions as well as European Championships and World

Championships. Events can also be divided into sectors, like corporate, public, or charitable sector. Another way to categorize an event is to divide it into either external or internal events. (Dowson & Basset 2018, 7.)

3.2 Events industry size and structure

Individuals and organizations who are involved in the event organization can be divided into the following categories: event clients, event organizers and event suppliers. Suppliers are the biggest group, and every event will include a variety of different suppliers. There are often more clients than organizers. Usually, one or two professional event organizers are working on a specific event while working on other events at the same time. (Dowson & Basset 2018, 9-11.)

Event clients are companies or individuals who hire professional event organizers to execute the event. Event organizers can be event management companies, professional event organizers or party and event planners. They plan, organize, and run the event on behalf of the client and work as a liaison between the client and the suppliers. Event suppliers provide goods and services that are needed to organize the event. They range from various specialist organizations providing different elements to the event, for example audio visual companies, food and beverage as well as transport and accommodation. (Dowson & Basset 2018, 9-13.)

The event industry overlaps with some related industries such as tourism, hospitality, marketing, and sports industries. The event visitors use the services of tourism and hospitality industry bringing them economic growth. In the event itself the services of these industries will also be used. Hosting an event also promotes the destination which can affect the image of the area, like Edinburgh promotes itself as the leading festival city of the world. It will also bring more tourism to the area even after the event. Hosting, sponsoring, or participating in events gives a unique way for companies to market themselves. Also, in the sporting industry events and competitions are very common but they are often grouped under sports industry instead of event industry. (Dowson & Basset 2018, 14-20.)

Having such a diverse variety of different events and the industry overlapping with other industries, it can be difficult to estimate the full size and the worth of the event industry (Shone & Parry 2013, 31). However, different studies have been able to estimate the value of the market and other interesting metrics. For example, a report conducted by Oxford Economics, and commissioned by Events Industry Council, shows that in 2016 1,9 million meetings with 251 million participants were held in the United States (International Congress and Convention Association, 2018).

In 2019 Allied Market Research (2022) has estimated the value of the global event industry market to be 1,135.4 billion US dollars. Verified Market Research (2022) valued that the global events

industry market was worth 886.99 Billion US dollars in 2020. Both researches forecast the market value to increase, so the difference between these two valuations does not imply that the market value is decreasing. This difference could be explained by the difficulty to estimate the value of events industry.

According to both, Allied Market Research (2022) and Verified Market Research (2022), in 2019 corporate events and seminars were the biggest segment followed by sports events and music concerts (figure 1). From figure 1, it is also possible to see that the each segment is to grow accordingly. Verified Market Research (2022) shows corporate to be the biggest organizer segment. However, according to Allied Market Research (2022) the biggest organizer segment is entertainment.

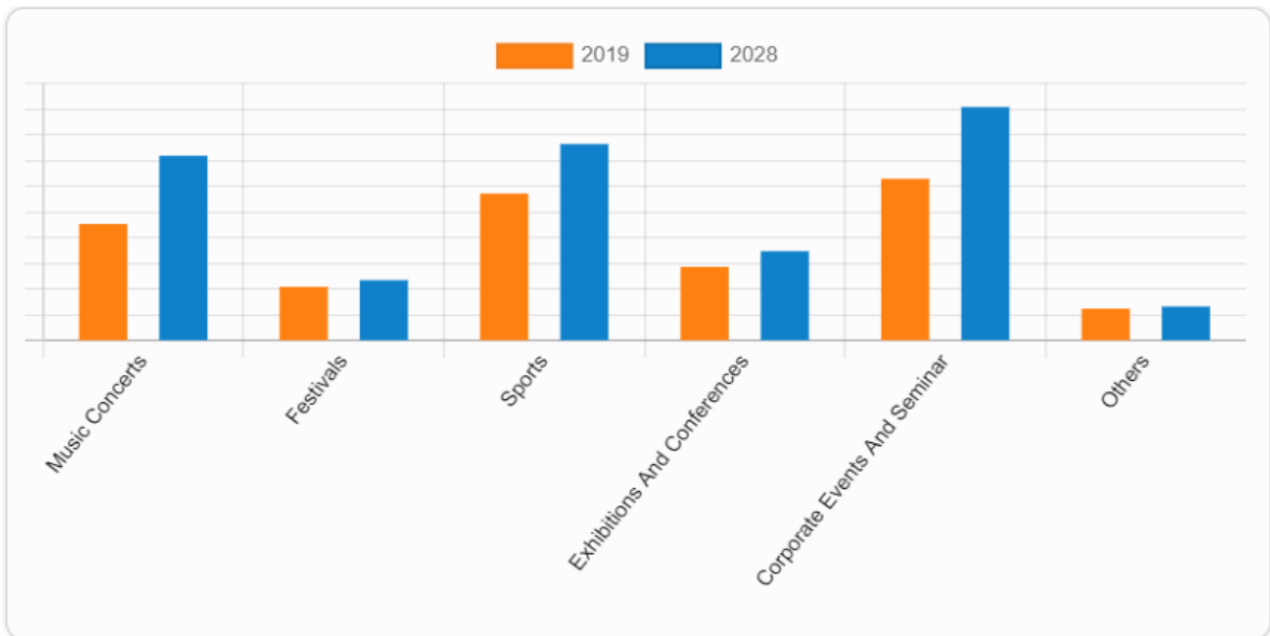


Figure 1 Events Industry Market by Type in 2019 and 2028 (Allied Market Research 2022)

3.3 The impacts of events

For a community, events can be a way to build the sense of community and improve social connections. Events can also help to strengthen the local community structures. With events it is possible to build up relations between communities with different ethnic backgrounds or advance social and political initiatives. Especially in smaller communities, the main reason to organize an event is the social aspects of it. The social aspect can be to gain new members for a club, bring joy and happiness to the people, or to bring the community together and provide people with an opportunity for interaction. (Shone & Parry 2013, 74-77.)

The need to maintain social connection has increased in the current society with social media, remote work, and the decline of the more traditional family structure. Events are an effective and important way to have more opportunities for social interaction. (Shone & Parry 2013, 74.)

Events have economic effects in the region where it is organized. Indirect effects refer to the event participants spending on local businesses and services such as retail, catering, transportation and so on. Sometimes the indirect effect can be even more significant than the direct effects. For some destinations event tourism is more suitable than other forms of tourism, so events are an economic salvation for them. (Shone & Parry 2013, 79.)

A study on the global economic significance of business events was conducted in 2018. This study found that in 2017 “business events generated more than \$1.07 trillion of direct spending, representing spending to plan and produce business events, business events-related travel, and other direct spending, such as spending by exhibitors.” On average the participant of such an event would spend around 704 US dollars. These events also supported more than 26 million direct and indirect jobs around the world in 2017. (Event Industry Council 2018, 5.)

Some events can have a variety of different political implications. Cities often tend to organize celebrations or ceremonies to mark progress that is made, such as construction of a new hospital, or to strengthen civic pride. Local authorities taking part in local events shows the people they are committed to and gives the authorities a positive image. Events often have several political stakeholders such as local councils, government agencies, political parties, companies and sponsors, and the local people. (Shone & Parry 2013, 82-85.)

All events have an impact on the environment. Some environmental impacts come from travel and transport, food and beverage consumption, energy consumption, water consumption and waste. The impacts can be direct and local but also long-term and global. (eventIMPACTS s.a., 2-3.)

Events Industry Council has listed four principles for sustainable events to preserve nature, to foster a healthy and inclusive society as well as to support the economy. With the four principles event organizers pledge to implement sustainable practices and communicate them to their stakeholders. They pledge to follow environmental practices such as conservation of resources and waste management, and to consider social implications such as labor practices, community impacts and safety and security. In addition, they support practices that thrive the economy sustainably, for example by supporting local small and medium businesses and being transparent as well as governing responsibly. (Events Industry Council s.a.)

4 Conferences as events

This thesis specifically focuses on conferences, one of the many different types of events. There are elements in conferences that set them apart from other events. In this chapter, I will talk about these elements but also explain why conferences are important.

A conference is a suitable event when we want to give participants the opportunity to hear from experts of the field, to network with a wide range of people with similar interests and to broaden their perspectives in a different setting that also facilitates learning. Conferences also provide a platform to share ideas and receive feedback both for the organizer and for the participants. For the organizer it is a great chance to showcase projects or research faster and more effectively than written publication. Sometimes conferences can also be a way for the organizer to generate income, but not all conferences are organized to make profit. (Campbell, Robinson, Brown & Race 2003, 10-11.)

Conferences together with exhibitions are not the biggest segment of the events industry but they are a significant contributor. This segment is forecasted to have a major market presence in the future. (Verified Market Research 2022.) For example, more than 13 000 international association meetings were held in 2019. International association meetings are non-corporate and non-governmental meetings. (International Congress and Convention Association 2020, 10-11.)

4.1 Special characteristics of conferences

Conferences have specific features that make them special compared to other events. These are the length and purpose of the conference, but also the structure of the conference. The conference program is particular with different elements, and the organizing committee often follows a special structure. Conferences have large impacts on the organization, participants, and the environment.

The audience as well as the program of an event will depend on the type of an event that is held. According to Campbell et al. (2003, 8) a residential conference lasting 2-3 days is good for large international, national, or regional audiences that do not otherwise have the opportunity to meet with each other.

The conference program revolves around a specific theme. The program consists of a scientific program, social program and avec program. Sometimes an exhibition is organized as part of the conference. The scientific program includes plenary sessions, free papers, symposia, panel discussions and workshops. The social program typically includes an opening ceremony, welcoming get-together, civic reception, and banquet. Conference participants often bring an avec with them

who does not participate in the actual conference, so an avec program is organized for them. (Aarrejärvi 2003, 41-45, 97-103.)

Congresses and conferences have a significant impact on the local businesses and economy. Delegates, participants, the media and so on use the services of the hospitality industry during the event creating more income for the field. Also, the organization of the conference requires services from several local suppliers. (Rautiainen & Siiskonen 2013, 88.)

The congress or a conference also makes the host city and country more known, which boosts recognition but can also affect tourism in the upcoming years. Hosting a conference also facilitates international collaboration in the field that the conference covers. Especially in the field of science, it can be a greatly beneficial way to highlight local research and make it known globally. (Rautiainen & Siiskonen 2013, 88-89.)

4.2 Value of conferences

Edwards et al. have previously found out that conferences have benefits in five areas: intrinsic, practice, social, economic, and attitudinal. Later in the book "Power of Conferences" the authors interviewed high achievers from different fields on effects of conferences in their personal and professional achievements. From these stories the authors have gathered insights on the long-term outcomes of conferences. Six main themes were found to be: 1. Creating networks, collaborations, partnerships, and support; 2. Discussion, debate, stimulation, ideas, and innovation; 3. Attracting funding, trade and investment; 4. Influencing public perceptions and policy and driving social change; 5. Personal growth, knowledge and learning; 6. Lessons for industry. (Edwards, Foley & Malone 2017, 13, 126-127, 132, book cover.)

As seen in figure 2, conferences have intrinsic and professional practice benefits that benefit the participants and their workplaces, and they also have attitudinal and economic benefits that benefit the communities, industry sectors and economies. Some benefits take place during the event while others happen after the event. Some benefits even have long term impacts. (Edwards, Foley & Malone 2017, 134-135.)

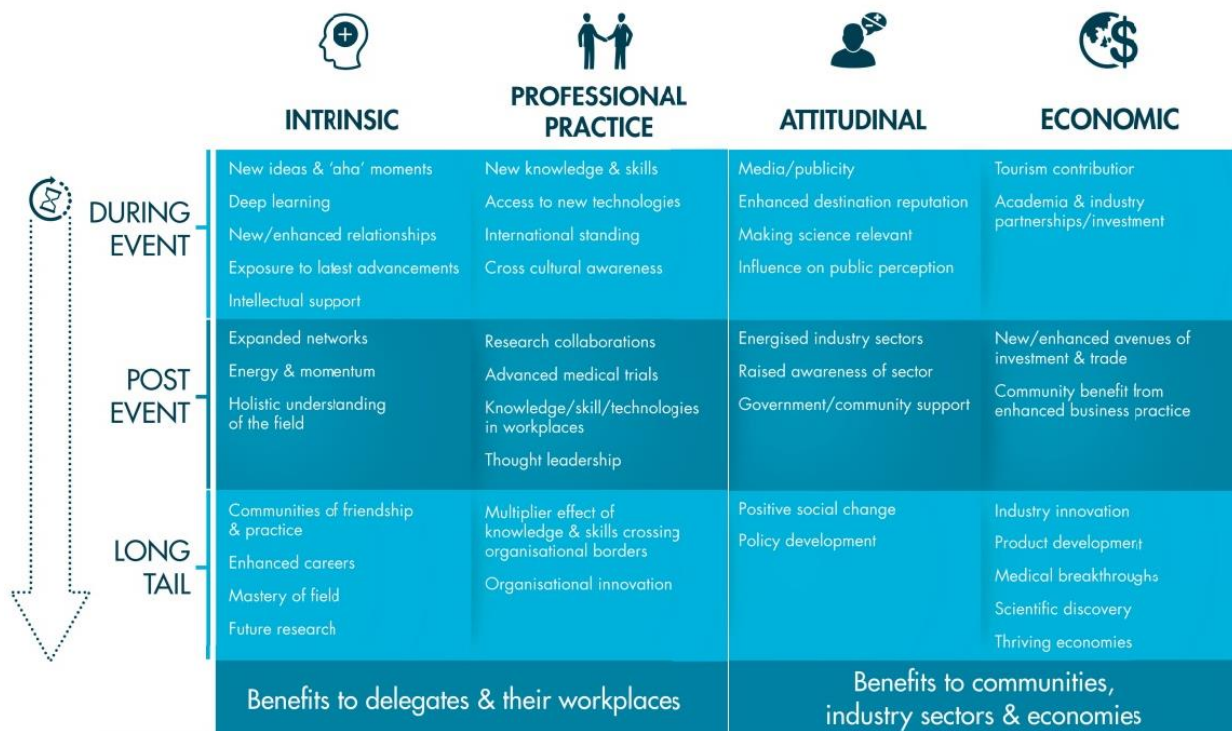


Figure 2 Benefit and outcome legacies arising from business events (Edwards, Foley & Malone 2017, 134-135).

Intrinsic and professional practice outcomes benefit the attendee and their workplace. Intrinsic benefits are the gained knowledge and developed skills through participation in a conference and its collaborative environment that facilitates the interaction of liked-minded people. Professional and practice benefits are the outcomes of the intrinsic benefits. The skills and knowledge gained from the conference are implemented into their organizations and professional practices. The networks built at the conference are also included in the professional benefits. (Edwards & al 2017, 132-134.)

Attitudinal and economic outcomes benefit communities, industry sectors and economies. Attitudinal benefits refer to the raised awareness and reactions. It happens in the attendees through participation as well as in the governments, private sector, and individuals through the media. (Edwards & al 2017, 133-135.)

The economic benefits can be tangible as well as intangible. These benefits include new business partners, new investments, or funding as well as better policies within the industry. They also include the gained knowledge and skills and improved practices. (Edwards & al 2017, 133.)

One of the main benefits of a conference is the opportunities for participants to create and strengthen networks, collaborations, and partnerships. These networks made at the conferences

can boost career development, personal growth and even provide intellectual support. It is possible to connect with people who one would not encounter otherwise either at the conference or through the new connections made there. Conferences have also demonstrated to be find investors and get access to funding. (Edwards & al 2017, 127-129.)

The face-to-face aspect of interactions is present at the conferences through body language and reactions. They can be evaluated and responded to which leads to conflict resolution, social change, and people respecting others by letting them voice their views. In conferences, the discussions and debates between people who have different perspectives result in new ideas and innovations as well as new ways to tackle problems and challenges. (Edwards & al 2017, 128.)

Conferences can also influence the public and media perceptions, influence policies, and drive social change. A conference can gain exposure in the media and bring together experts which can lead to changes in national and international policies, as one interviewee reported to have had happened with a policy on the treatment of AIDS after one conference. Another interviewee reported that media reports of the research he presented at a conference attracted more people to participate in his clinical trials. (Edwards & al 2017, 130.)

The latest knowledge on a particular field is often shared at a conference a couple of years before it becomes published elsewhere. The conference attendees can also learn from people outside their field. This gives the attendees an advantage to stay ahead in their field. Conferences also provide the experts with an understanding of what other experts in a similar field are working on around the world. Through a conference it is also possible to gain international credibility and reputation. (Edwards & al 2017, 130-131.)

4.3 Difference between congress, conference, and convention

The terms conference and convention are often used interchangeably. Different entities provide definitions with slight differences. Sometimes the difference is in membership, Social Tables highlights that the main difference is that convention participation is based on some sort of membership (Social Tables s.a.)

Event Industry Council provides the following definitions in their industry glossary for conference, congress, and convention:

Conference: 1) Participatory meeting designed for discussion, fact-finding, problem solving and consultation. 2) An event used by any organisation to meet and exchange views, convey a message, open a debate or give publicity to some area of opinion on a specific issue. No tradition, continuity or timing is required to convene a conference. Conferences are usually of short duration with specific objectives, and are generally on a smaller scale than congresses or conventions.

Congress: 1) The regular coming together of large groups of individuals, generally to discuss a particular subject. A congress will often last several days and have several simultaneous sessions. The length of time between congresses is usually annual, although some are on a less frequent basis. Most international or world congresses are latter type; national congresses are more frequently held annually. 2) European term for convention.

Convention: Gathering of delegates, representatives, and members of a membership or industry organisation convened for a common purpose. Common features include educational sessions, committee meetings, social functions, and meetings to conduct the governance business of the organisation. Conventions are typically recurring events with specific, established timing.

(Event Industry Council Insights. s.a.)

5 Organizing a conference

Event planning is a process that often follows the same path but under the surface it has different components. In this chapter the process of organizing a conference is covered.

A simple way to divide an event into different phases is to have three phases: planning before the event, managing the event, and the processes after the event. The planning of an event makes up 75% of the event, executing and managing is only 10% and the phase after is 15% of the event (Wallo & Häyrynen 2022, chapter 7).

According to Wallo and Häyrynen (2022, chapter 7) in the planning phase the project gets started with brainstorming and considering different options and resources. After that decisions and practical arrangements are made. The execution of the event includes building the event as well as taking it down but also managing the actual event while it is happening. After the event there are tasks related to feedback, evaluation, and promotion. (Wallo & Häyrynen 2022, chapter 7.)

Depending on the type of event the timeline of the event looks different. For conferences some sources suggest starting the planning 12 months prior while others suggest a timeline of more than 2 years. Figure 3 is an example timeline for a conference that starts 18 months prior to the conference date. The timeline highlights the main tasks related to conference planning; it is not an extensive list.

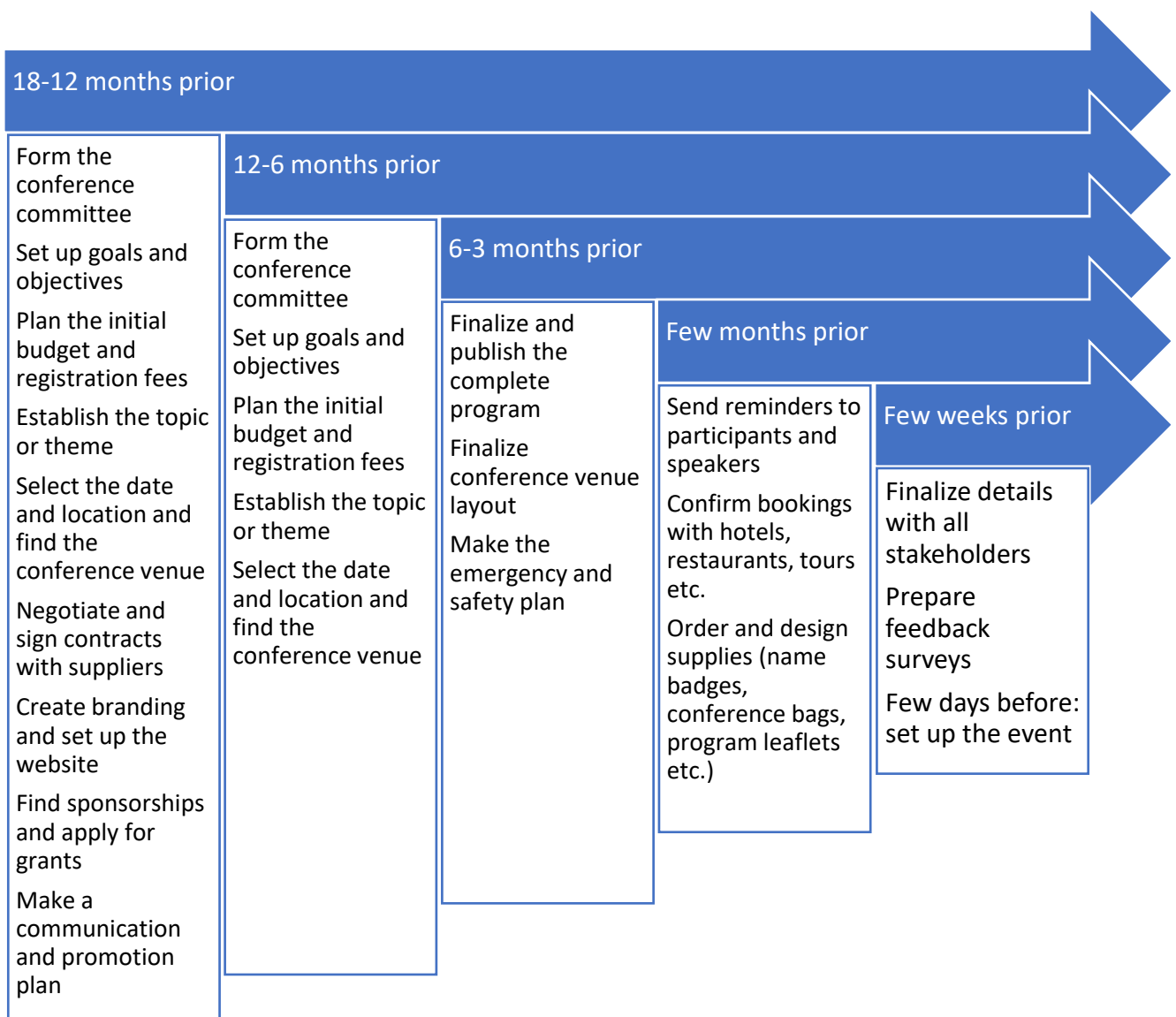


Figure 3 Conference timeline (made after IEEE Meetings, Conferences and Events s.a. & National Council of Teachers of English 2021)

5.1 Phase 1: Planning – Before the event

5.1.1 Organizing committee

The first step of a conference organization process is deciding the organizing committee. According to Aarrejärvi, the organizing committee of the conference typically consists of six roles. The role of chairperson, also known as the president of the conference, can be ceremonial and mostly for PR purposes or it can also include the tasks of the main secretary. The chairperson is usually someone from the organization who is well recognized. They are the host and face of the conference but also oversee the organizing process. The main secretary coordinates the technical

arrangements of the conference organization. The technical secretary works together with the main secretary, who oversees the practical arrangements. The treasurer, together with the main secretary, is responsible for the budgeting. The publicist oversees the PR materials for the conference. The secretary of the social program has the responsibility to take care of the social program happening outside of the scientific program. (Aarrejärvi, 2003, 19-22.)

Besides the organizing committee, other help is also needed. A conference planning company can be hired to help with the planning of the conference. A conference planner can offer consultation from the beginning and take care of all the arrangements from the logistics and budgeting to the practicalities such as organizing the accommodations and social program. If the secretaries of the organizing committee are well experienced, hiring a company to help with the arrangements is not necessary but there are other services that could be outsourced. A travel agency can be hired to help with registration and accommodation, social program, as well as pre- and post-tours. (Aarrejärvi 2003, 23-25.)

5.1.2 Strategic planning

The 5W's is a simple and effective way to conceptualize any event. It answers the following questions: why, who, what, when and where. It helps to understand why the event organized and what are the purpose, motives, and objectives. The question "who" covers the target audience and customer profile as well as the attendee numbers. The event program, format and activities are also covered. Lastly the 5Ws guide the organizer to answer when will the event happen, considering date, season, and occasion, but also what are the location, venue, and surroundings of the event. (Dowson & Basset 2018, 26-27.)

When establishing objectives, all stakeholders must be considered. Some ways to determine the objectives are Five Es, hierarchy of objectives, smart objectives, and legacy objectives. (Dowson & Basset 2018, 31-33.)

Five Es helps to understand what emotions and feelings the attendees will experience in the event. The attendees are expecting to be educated, enlightened, engaged, energized, and entertained at the conference. Using this method objectives are set to meet these expectations. (Dowson & Basset 2018, 32.)

The hierarchy of objectives organizes the different objectives from most important to the least important. By prioritizing the objectives, the organizers will understand where they should focus their attention. Objectives with high value should be met first, and then focus on the objectives with low values. High value objectives are essential for success, whereas the low value are objectives that are nice to have but not necessary. (Dowson & Basset 2018, 32-33.)

SMART objectives approach helps to create objectives that are specific, measurable, agreed, realistic, and time bound. It is one of the most common methods to determine objectives. For the objectives to be *specific*, state what is expected to be achieved and use action verbs to describe what needs to be done. Also include a target or a milestone for the objectives to be *measurable*. All intended outcomes must be *agreed* upon. For them to be *realistic*, take into account the skills, knowledge and resources available. So that the objectives will be met, it is important to set a timeframe making them *time bound*. (Dowson & Basset 2018, 32-33.)

Stakeholders are the parties interested in the event's outcome, and they all have different expectations and priorities that can conflict with each other. The stakeholders can be divided into internal and external stakeholders. Internal stakeholders are the ones within the organizing organization and external stakeholders are the ones outside the organization, such as the participants and suppliers for example. (Dowson & Basset 2018, 35-36.)

Especially with conflicting interests, managing stakeholder relationships are important since they can affect the outcome of the event. With Mendelow's Stakeholder Power and interest Matrix is a helpful tool to determine which stakeholders to prioritize. It divides the stakeholders into four groups based on their interest and power in the event, and then suggests different strategies to manage each group. (Dowson & Basset 2018, 36-38.)

5.1.3 Financial Planning

Determining the initial budget prevents the organizers from wasting time and effort planning something that is not possible to achieve with the budget, for example visiting venues that do not fit in the budget. At this point it should also be decided what costs are included in the budget. For example, is accommodation or transportation covered from the budget or at the expense of the participants. (Dowson & Basset 2018, 28-29.) At this stage it is also important to calculate the break-even point and take necessary actions in case the break-even point is not reached. (Aarnejärvi 2003, 34).

When organizing an international conference, the initial financing of the conference can create some challenges. The reason for this is that the financing is the responsibility of the organizers, and the international organization is rarely able to assist with financing the conference. The conference can be financed with a loan or with sponsorships. Often the country or the city where the conference will be held sponsors the conference financially. (Aarnejärvi 2003, 29-30.)

Studying the financial statements of the previous years can be helpful when planning the budget. The conference income consists of possible starting loan, participation fees from the conference participants and their avec, sponsorship from the city or country as well as companies, and the

income from a possible exhibition. The expected participant number is made by taking the average of the participant numbers of the previous conferences. The expenses can be divided into fixed costs and variable costs. Fixed costs include costs for meetings and compensation of committees, marketing and publications, venue, speakers, transportation, office, financing costs, and miscellaneous costs. The variable costs are dependent on the participant number, and consist of costs such as catering, conference bag and other materials, and social program. (Aarrejärvi 2003, 30-33.)

5.1.4 Conference venue

When choosing a conference venue, it is important to consider the location as well as how it fits all the participants and suits the needs of the program. The venue should be easily reached from the accommodation and by car, and thus also have parking space. The lobby and main session room should be big enough to accommodate all the participants. The venue should also have enough smaller rooms for the simultaneous sessions, and other rooms for speakers, staff, storage and so on. Possible venues can for example be hotels, conference centers, and universities. (Aarrejärvi 2003, 11-13.)

According to Rautiainen and Siiskonen the 4 As are good criteria for choosing a conference venue. This means that accessibility, affordability, attractiveness, and amenities should be considered. Additionally, it is important to consider the location of the venue and accommodation options, transportation options to the venue, and available services near the venue. Possible venues can for example be conference and exhibition centers, hotels, and universities. (Rautiainen & Siiskonen 2013, 32-47.)

A crucial factor in venue selection is the amenities that are available, including different spaces and services. Security is also an extremely important factor to consider. The needed spaces include a spacious lobby area, functional area for catering, suitable rooms for all the different sessions, and spaces for the speakers, staff, media, storage and so on. Lot of different audio-visual equipment is also needed such as microphones, sound system, projectors, and internet connection. The venue and site layout should have emergency exits, fire extinguishing equipment and security systems. (Rautiainen & Siiskonen 2013, 37-51.)

5.1.5 Conference program

The conference program consists of a scientific program and a social program. The scientific program is typically designed by the international organization behind the conference. The social program of a conference includes social events, avec program and possible post- or pre-tours. An

exhibition can also be organized as a part of the conference either in the lobby or in an area designated for the exhibition only. (Rautiainen & Siiskonen 2013, 145-152.)

Scientific program

Plenary sessions feature speakers that are experts in the field talking about central topics related to the conference theme. They are often the only sessions where there are no other sessions happening simultaneously, aiming for all conference attendees to participate in them. The other sessions of the program tend to have other sessions happening at the same time and attendees can choose which session they would like to participate in. (Aarrejärvi 2003, 41-43.)

The other sessions can be free papers, panel discussions, symposia, and workshops. The organizers recruit the speakers for the different sessions, but free papers are sessions that people can apply for to present a topic of their own. Symposia is a type of session that starts with preliminary presentation or speech after which the participants have a chance to discuss the topic. (Aarrejärvi 2003, 43-45.)

Social program

The opening ceremony is a formal event that opens the whole conference. Besides the conference participants, local authorities can also be invited. The program of the opening ceremony typically consists of the official opening speech of the president of the organizing committee, followed with a welcoming speech by a representative of the host city or country, and a welcoming speech by a representative of the international organization. The program should also include some performances for example from local artists and performers. The opening ceremony can end with a cocktail or buffet dinner. (Aarrejärvi 2003, 97-98.)

Welcoming Get-together is a networking event to welcome the participants to the conference. It is often a cocktail event that can have finger foods but typically a full dinner is not served. The program can include a speech by the organizer and music. Civic reception is an event that the host city organizers for the conference participants. It is a way to show appreciation for the participants but also for the income that the conference brings to the city. (Aarrejärvi 2003, 98-99.)

The banquet acts as a closing celebration to thank the participants for coming to the conference. Local authorities, and other important members are invited to the banquet as guests of honor. It is a formal dinner event that has seating arrangements either for everyone or more typically only for the guests of honor, written invitations, and program. The program can consist of speeches, entertainment, and dances. It should follow the traditions of each conference. (Aarrejärvi 2003, 99-101.)

The avec program makes an important part of the conference. Especially when thinking about PR, the avec program opens a new possibility to showcase the local culture. The avec program is led by a host who takes care of the group and accompanies them on the different excursions. The avec program starts with an information session and is followed by different excursions. These excursions should present the local culture and way of living, showcasing what makes this destination special. That could mean food culture, history, design and handicrafts, governmental structures, typical homes, and similar topics. (Aarnejärvi 2003, 102-105.)

Often a pre- or post-tour is offered in addition to the conference's official program. It is a short trip, often organized by a travel agency, to show the participants a little more about the culture and sights of the conference destination. (Aarnejärvi 2003, 106-107.)

5.1.6 Logistics

Conference planning should be started by making a schedule since the conference logistics include many different tasks (Aarnejärvi 2003, 49). The variety of tasks are for example related to the visual image, conference materials, registration, accommodation and transportation, and catering.

Materials that are given to the participants at the conference are scientific program, conference bag and name tags as well as other personal materials such as vouchers and invitations. The contents of each item need to be planned beforehand. These items are typically given out when a participant registers at the conference venue, so they need to be prepared before that and accessible at the time of registration. (Aarnejärvi 2003, 57-58, 61-62.)

Registering for the conference is done with a registration form. In the registration form all the personal details are asked, participants choose their preferred ticket type and possible additional programs as well as their accommodation. (Aarnejärvi 2003, 58-59.)

Accommodation is typically provided as part of the conference. The chosen accommodation options are often within walking distance of the conference venue. The organizers negotiate a price for a group deal with the hotels and oversee making the reservations for the participants. (Aarnejärvi 2003, 71-72).

5.1.7 Marketing, promotion, and publicity

Marketing starts by creating a marketing plan that includes a schedule, marketing channels and determining the target group. When marketing the conference, it is good to focus on the elements that make the specific conference unique from the others organized in the same field. This is

usually related to the conference location and what makes it a special destination. (Aarrejärvi 2003, 50-51.)

The first call or first announcement is the first publication about the conference. It is designed to bring the conference to the attention of the target group and to pique their interest. It is often published well before the conference takes place. It should include all the basic information about the conference: name of the conference, main themes, location, and date, who organizes the conference, contact information of the organizing committee and a webpage. (Aarrejärvi 2003, 53.)

Preliminary program and call for papers are informative publications that should include information about the scientific program and a personal welcoming message from the conference president and other key persons. A preliminary program of the scientific program should be included but also information about the keynote speakers is important. Additionally, it should also include information about the tickets and fees, accommodation, location, venue as well as the social program. Together with the preliminary program a book of abstracts can be sent, so interested parties can submit their applications to host a session at the conference. (Aarrejärvi 2003, 54-55.)

Often information about the conference is given to the media. That could include news articles about interesting topics, press releases and press conferences. As always, careful planning and execution is important, so the conference is presented the right way but also to catch the interest of the media and audience. (Aarrejärvi 2003, 93-96.)

5.1.8 Event staff

An essential part of a conference's success is the well-trained staff and volunteers who represent the conference. Every person working at the conference site should be well informed about the conference to make their job successful. The conference staff includes secretaries' assistants, personnel for the registration and information desks, technical assistants, and assistants for the speakers and sessions among other roles. (Aarrejärvi 2003, 78-80.)

5.1.9 Safety and security

It is important to do a risk analysis to find out what can happen, to who, how, when, and why. Possible risks can for example be crimes, accidents, and fire safety. To prevent any risks the safety and security plan needs to be carried out carefully. The safety and security in a conference is achieved with guarding, technical monitoring, and access control. (Rautiainen & Siiskonen 2013, 176-180.)

5.2 Phase 3: Managing the event

Before the event can start, there are still a lot of things to take care of. One of the first things should be to hold a meeting to go through the program and venue of the conference. Other essential tasks are for example to establish a base room, make sure that all the equipment, supplies and materials are in their places in a good condition, and to go through the event venue checking the safety and cleanliness. There are also different meetings, debriefings and rehearsals happening. Right before the event starts it is important to make one last round to check that all equipment is working, and all the indoor and outdoor spaces are organized as they should be and that they are clean. (Dowson & Basset 2018, 271-277.)

During the event, the event managers have several important tasks which are often divided to different people or different teams. Someone needs to make sure that everything is on track, meaning they need to make sure that event runs on time, all the elements are where they need to be and on time, and find solutions to issues that occur. It is important to make the VIP's, keynote speakers and other participants to feel welcomed and special. The event manager should also be a role model for the staff, help bring the team together and be there to give support if needed. Paying attention to safety throughout the whole event is also an essential task. (Dowson & Basset 2018, 282-284.)

After the event ends, the organizers will make sure that the participants are able to leave the event without any problems. After the participants have left, the event should be shut down by packing and transporting all the equipment, supplies and materials before cleaning can start. It is very useful to gather the organizers, partner organizations and key suppliers to have a so called "hot debrief" where everyone can share their thoughts about the event while they are still on top of their heads. (Dowson & Basset 2018, 48-49, 288-289.)

5.3 Phase 4: After the event

5.3.1 Evaluation

Evaluating the event's success is an important step to find out what was achieved and if the objectives were met. At this stage it is also important to figure out what worked well and what didn't. The evaluation includes the thoughts and opinions of the organizing team, but also of all the stakeholders involved with the event. (Dowson & Basset 2018, 48.) It is a good idea to gather feedback from different stakeholder groups such as attendees, speakers, representatives of the international organization, and event staff. (Aarnejärvi 2003, 108.)

Customer feedback and satisfaction should be measured in different areas. These areas can be for example about the scientific and social program, venue, catering, logistics and accommodation. Participants could also be asked how they felt about the information that was made available before the conference and how the registration worked. (Aarrejärvi 2003, 108.)

Gathering information about the conference's success will be helpful for future organizers. Information about the success of the marketing and the final budget are important in addition to the feedback from different stakeholders. (Aarrejärvi 2003, 108-109.)

For the financial evaluation, it is good to analyze how well the budget was followed. If some expense group was significantly different from the budget it should be noted and analyzed the reason behind it. Marketing can also be evaluated by the cost per participants. It should also be analyzed at which stage of the registration participants registered if different ticket prices were used. (Aarrejärvi 2003, 109.)

5.3.2 Debrief

Debriefing is an essential part of the evaluation process. Right after the event has ended, the organizers should gather everyone involved in the event organization and execution together for a hot debriefing meeting.

In addition to the hot debriefing, an actual debriefing meeting should be scheduled some time after the event giving everyone time to reflect. When the meeting is scheduled some time after the event, by then it has been possible to evaluate the feedback from the participants. (Dowson & Basset 2018, 48-49.)

5.3.3 Follow up

A follow-up is typically a personal thank you letter sent to the participants and other involved parties to thank them for their involvement. It can also include promotional materials and invitations to upcoming events. (Dowson & Basset 2018, 49.)

6 Strategic analysis of Rotex International Convention

I have analyzed the Rotex International Convention based on some of the strategical analysis tools introduced in the previous chapter. The analysis was made more of the concept of the conference. Each individual conference will be different and will have slightly different results.

6.1 5 W's

Table 2 5 W's of Rotex International Convention

5W's of Rotex International Convention	
Why? <i>Purpose, motives, and objectives</i>	<ul style="list-style-type: none"> - Develop Rotex community together by learning from plenary sessions and having conversations in the breakout sessions. - Network with other Rotex members - Share experience and knowledge. - Make Rotex a part of the youth exchange program. - Help new associations to be started and old ones to become even better.
Who? <i>Target audience, customer profile, attendee numbers</i>	<ul style="list-style-type: none"> - Mainly Rotex since we want to focus on building the Rotex community and network. - Other RYE alumni are also welcome to network and share experiences with other alumni. - Rotarians who are into RYE to come and learn more about Rotex but to also share their perspective from the other side.
What? <i>Activities, program, format</i>	<ul style="list-style-type: none"> - Plenary session with topics of common interests. - Breakout sessions can be group discussions, presentations, workshops etc. - Social program for networking and building friendships. - Post-tour (not mandatory).

When? <i>Date, season, occasion</i>	<ul style="list-style-type: none"> - Every two years - Late July to mid-August - Summer holiday season because most participants are students
Where? <i>Location, venue, surroundings</i>	<ul style="list-style-type: none"> - Anywhere in the world with an active Rotex association - Previously has been organized in Europe and Asia, it was planned for South America but was cancelled due to COVID-19

6.2 Rotex International Convention objectives

These objectives are general objectives for the conference and are aligned with Rotex International's goals. Each conference and organizing team can have their own specific goals for that conference.

1. Strengthen the Rotex community through networking and providing an opportunity for Rotex members from all around the world to socialize and make friendships with each other during the conference and the social program.
2. Develop the work of Rotex associations on a local and international level by sharing knowledge and through the conference program.
3. Building a stronger image of Rotex to gain more support from Rotary International and regional Rotary Youth Exchange Programs.
4. For Rotex International board current and previous members to make personal connections with Rotex associations and create more engagement with Rotex International.

6.3 SWOT Analysis

The Rotex and Rotary Youth Exchange Alumni community is strong and loyal. One will always be an Alumni of the program. This results in many potential participants. The community is also constantly growing, which creates more interest in the conference and a need to learn from others. Also, the interest in Rotex from Rotarians is increasing and more Rotarians are also willing to participate in the conference.

There is also nearly no competition. There are international and regional conferences about Rotary Youth Exchange Program, but Rotex is often not the target group for these. Some Rotex

associations have local gatherings, but Rotex International Convention is the largest event focused on Rotex members and the only one happening on an international level.

The organizing committee is fully formed of enthusiastic volunteers, which makes them highly motivated to work on the conference. On the other hand, they might lack some knowledge since there are no requirements of knowledge or previous experience. The next host is decided two years prior to the conference, which is a normal timeline for conference organization. But considering that the organizers are not professionals working full-time but volunteers with other commitments, the timeline can be tight.

Unfortunately, there are no finances or guaranteed financial support for the conference. Each organizing team starts from zero. This can be a problem since they most likely need to make some payments before ticket sales have started, thus they need to find some financial support.

The conference participants are mostly students and young professionals, so if the conference is too expensive, they won't be able to participate. Conferences in general tend to be expensive so there is a need to keep the conference affordable either through sponsorships or keeping the cost low.

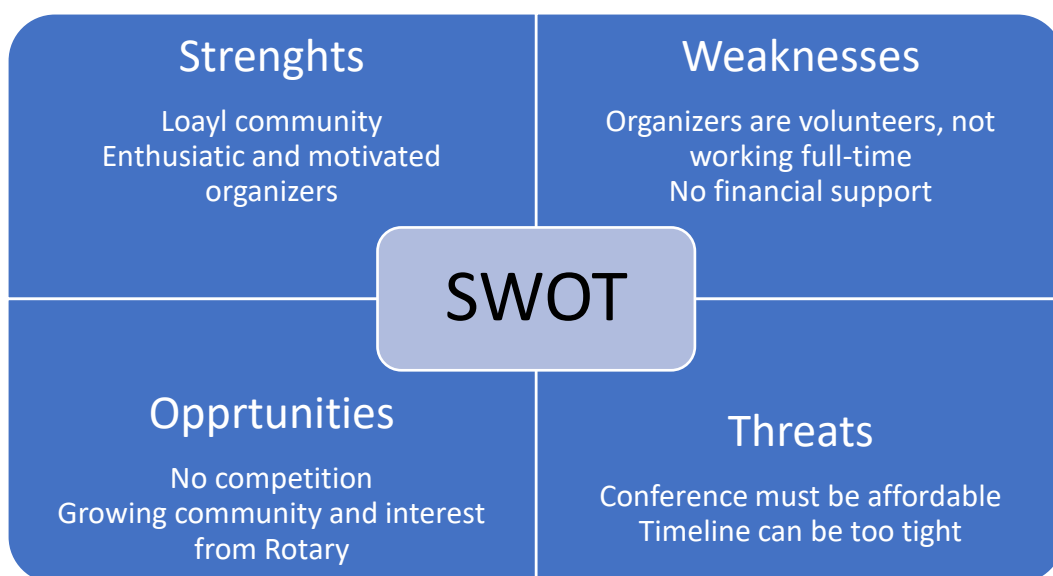


Figure 4 SWOT Analysis for Rotex International Convention

7 Discussion

The objective was to create a guide for an inexperienced organizing committee to assist them with the organizing process. The guide covers many aspects of the planning phase. Some aspects are universal and can be applied to any conference, such as budget planning or ticket sales. For these types of topics more detailed instructions are provided. When the size, budget or location can affect the best solutions I have provided things to consider and further research. The guide does not automatically respond to all the questions, as it was not meant to, but it does cover the essential parts giving the organizers an idea of what to think about.

The guide is shared with the current organizing committee who are in the middle of their planning process. They can use this guide to help them move forward. In the future the guide will be shared with the new hosts after they have been selected. They will also documentation from the previous organization process that I encourage the organizers to keep and Rotex International to store.

I will keep working on the guide based on the feedback I receive about the guide from the current organizers throughout the process and improve the contents of the guide accordingly. It should answer the questions and needs that they have so their input is valuable for the development of the guide.

7.1 Considerations

Rotex International Convention is a less formal convention for a certain community. That combined with the fact that it is also fully organized by volunteers, means that the conference doesn't necessarily follow all the typical conference plans. It still has many of the features of a typical conference and it is expected to be a professional event, but of course it is not expected to be as elaborate as conferences organized by professionals.

The main target group is students and young professionals, which means that they cannot afford an expensive conference. Usually, conferences tend to be quite expensive so to keep the ticket prices affordable, the organizers either need to keep the costs down or get a lot of sponsorships. This means that the venues and accommodation might be simpler, and the social program does not necessarily include lot of performances or a banquet dinner.

What helps to keep the costs down is that speakers and presenters are not paid nor are their travel expenses covered by the convention. They are knowledgeable members of the Rotex and Rotary Youth Exchange community who as volunteers are willing to contribute and share their knowledge.

Usually, an avec program is a part of a conference but in this case no avec program is needed. The participants who are young adults are not expected to bring an avec. Some Rotarians do participate in the conference as well and they might travel together with their spouse. But the number of spouses who would not be interested in the conference is minimal so there is no need to arrange program for them.

7.2 Limitations

Even though the event organization process consists of planning, execution and the task after the event, the guide focuses only on the planning with a brief section about evaluation and feedback. The choice to only focus on the planning phase was made because the guidebook is already extensive as it is. Planning makes up the largest part of the organization with several distinct aspects. Currently there is a bigger need for advice on the planning phase than the other phases.

Since no documentation from the previously organized conferences could be accessed, the guide heavily relies on the theoretical framework that has been applied to suit the objectives and limitations of this conference, based on my best knowledge. I was able to gather some insights from a previously organized webinar by Rotex International that briefly discusses the organization to attract new hosts.

7.3 Ideas for improvement

At the current state most of the information in the guide is general level knowledge and advice. It will help the organizers to understand different aspects that they need to consider and research. In the future the guide can be improved by adding more practical tips from the organizers and examples of the organized conferences.

The budget, program, and participant data, for example, are important key information for even the experienced organizers. Collecting such data would be very useful for both Rotex International and future organizers so this should be stored in the future and added as a resource together with the guide. Additionally, the organizers' evaluation and the collected feedback should be stored and shared with future organizers to improve the conference.

The guide only does only focus on the planning phase. In the future the guide can be developed by information about the execution and management of the event as well as expanding the evaluation and other aspects of finalizing the event after. Sustainability and social responsibility are especially important topics in the event industry. They are not addressed in the current version of the guide but that would be an interesting theme to add during future revisions. It could be implemented as tips or checklist for good practices to follow.

Sources

Aarnejärvi L. 2003. Kokoukset ja kongressit: järjestäjän käsikirja. Edita Prima Oy. Helsinki.

Allied Market Research. 2022. Events Industry Market. URL: <https://www.alliedmarketresearch.com/events-industry-market> . Accessed: 28.3.2023

Campbell F., Robinson A., Brown, S. & Race P. 2003. Essential Tips for Organizing Conferences & Events. RoutledgeFalmer. London and New York.

Dowson, R. & Basset, D. 2018. Event Planning and Management: Principles, planning and practice. 2nd ed. Kogan Page Limited. London, New York and Delhi.

Edwards, D., Foley, C. & Malone, C. 2017. The Power of Conferences: Stories of serendipity, innovation and driving social change. UTS ePress. Sydney. E-book. Accessed: 29.3.2023

eventIMPACTS. s.a. Downloadable Toolkit: Environmental impacts of event. URL: <https://www.eventimpacts.com/impact-types/environmental> . Accessed: 29.3.2023

Event Industry Council. 2018. Global Economic Significance of Business Events. Washington, DC. URL: <https://insights.eventscouncil.org/Portals/0/OE-EIC%20Global%20Meetings%20Significance%20%28FINAL%29%202018-11-09-2018.pdf> . Accessed: 28.3.2023

Event Industry Council. s.a. Principles for sustainable events. URL: <https://www.eventscouncil.org/Sustainability/Sustainability-Pledge> . Accessed: 29.3.2023

Event Industry Council Insights. s.a. Industry glossary. URL: <https://insights.eventscouncil.org/Industry-glossary> . Accessed: 28.1.2023

IEEE Meetings, Conferences & Events. s.a. IEEE Conference Organizer Timeline. URL: <https://ieeemce.org/planning-basics/getting-started/conference-organizer-timeline/> . Accessed: 24.3.2023

International Congress and Convention Association. 2020. The International Association Meetings Market 2019. URL: https://www.iccaworld.org/cnt/Research/2019_ICCA_Statistics_Public_Abstract_Final.pdf . Accessed: 28.3.2023

International Congress and Convention Association. 2018. Meetings and events industry releases new economic impact data. URL: <https://www.iccaworld.org/knowledge/article.cfm?artid=548> . Accessed: 28.3.2023

National Council of Teachers of English. 2021. Sample Conference Planning Timeline. URL: https://ncte.org/wp-content/uploads/2021/06/Conference_Planning_Timeline.pdf . Accessed: 24.3.2023

Rautiainen, M. & Siiskonen, M. 2013. Kongressi- ja kokouspalvelut. Renewed 6th ed. Restamark. Helsinki.

Rotex International. s.a. What is Rotex. URL: <https://rotex.org/who-we-are/> . Accessed: 20.12.2022

Shone, A. & Parry, B. 2013. Successful Event Management: A Practical Handbook. 4th ed. Cengage Learning EMEA. Andover.

Social Tables. s.a. Trade Shows vs. Conferences vs. Conventions. URL: <https://www.socialtables.com/blog/event-planning/trade-shows-conventions/> . Accessed: 28.1.2023

Suomen Rotary. s.a. What is Rotary? URL: <https://rotary.fi/en/what-is-rotary/> Accessed: 20.12.2022.

Tapahtumateollisuus ry. s.a. Mitä on Tapahtumateollisuus? URL: <https://www.tapahtumateollisuus.fi/mita-on-tapahtumateollisuus/> . Accessed: Accessed: 24.3.2023

Verified Market Research. 2022. Events Industry Market Size and Forecast. URL: <https://www.verifiedmarketresearch.com/product/events-industry-market/> . Accessed: 28.3.2023

Wallo, H. & Häyrynen, E. 2022. Tapahtuma on tilaisuus: tapahtuman suunnittelu ja toteutus. Renewed 6th ed. Tietosanoma. Helsinki. E-book. Accessed: 21 March 2023.

Appendices

Appendix 1. Guidebook: How to host Rotex International Convention



How to Organize Rotex International Convention

Julia Töytäri
Rotex International
2023



Contents

Introduction	1
Previous Conventions.....	1
Role of Rotex International	1
What is included in this guide and how to use it?	2
1. Getting started	3
2. Choosing a date and a location	4
3. Financial Planning.....	5
Fixed and variable costs	5
Income.....	6
Contracts and other advice.....	7
4. Finding convention venue	8
What type of venue are you looking for?	8
How to search for venues?	8
5. Venue and site plan	9
What spaces are needed?.....	9
Signs and decorations	9
6. Accommodation, catering and transportation.....	11
Accommodation.....	11
Catering	11
Transportation	11
7. Conference Program.....	13
Scientific Program	13
Social Program	14
Post-trip	14
8. Registration and tickets.....	15
Ticket sales and types	15
Registration	17
Liability, insurance, and refunds	17
Registration on site.....	17
9. Marketing and communication	19
Marketing.....	19

Communication.....	20
10. Administrative duties.....	22
Permissions and notifications	22
Conference staff	22
11. Risk management and safety	24
12. Evaluation and feedback.....	25

Introduction

Rotex International Convention is organized every two years, each time in a different location. The convention is typically organized in August. The convention focuses on bringing Rotex together to network and strengthen our community. In the convention the plenary sessions and breakout sessions cover topics on how to improve Rotex associations and the Rotex Community as well as topic related to the RYE program in general. Besides Rotex from all over the world, also Rotarians and other alumni are welcomed to participate.

Previous Conventions

2012 1st Rotex International Convention in Bordeaux, France

Main topic: How to build a Rotex Club

2014 2nd Rotex International Convention in Brussels, Belgium

Main topic: How to improve Rotex

2016 3rd Rotex International Convention in Hannover, Germany

Main topic: Partnership between Rotex club and the relationship between Rotex and Rotary

2018 4th Rotex International Convention in Taipei, Taiwan

Main topic: The position of Rotex

In 2020 the 5th Rotex International Convention was meant to be organized in Curitiba, Brazil but had to be rescheduled to 2022 because of the Covid-19 pandemic. In 2022 unfortunately the event had to be cancelled due to low ticket sales.

Role of Rotex International

In the bylaws of Rotex International, the following is stated about the convention:

“14 Rotex International Convention

(1) The Rotex International Convention takes place every two years under the auspices of the Rotex International Board. Among other things, it serves the exchange among Rotexers, the further development of the association and networking.

(2) The Rotex International Convention is organised and hosted by one or more member associations.

(3) Rotex International is responsible for the content of the programme.

(4) Rotex International may also issue regulations in all other areas of the Rotex International Convention, taking into account the organisational status and timetable of the organising association.”

This means that the responsibility of the organization and hosting is on the local Rotex Club, but Rotex International will oversee and assist with the organization. We hope to

have continuous communication about the progress. Rotex International will be responsible for planning the content for the convention's scientific program but can also assist in other areas.

What is included in this guide and how to use it?

In this guide multiple topics about organizing a conference are covered. This is a guide to give you advice and directions on how to get started and what things to consider. It does not include all the possible information and you will need to do more research. This guide includes some suggestions and ideas on different topics but you are not required to follow them unless you want to. Rotex International encourages you to put your personality in the convention and come up with your own solutions.

This guide can be improved throughout the years to really serve its purpose to help the hosting club and organizing committee to organize and host a successful convention. If you come up with any additional topics that should be covered or practical tips, we would be more than happy to add them here.

Document your planning process well since it will be helpful for the future organizers as well as yourselves. Information about finances, program, as well as feedback and evaluation would be extremely helpful. Adding the different information as part of this guide will be appreciated. Also examples of printed materials, gifts given to the participants, marketing strategies and so on, could serve as inspiration for future hosts.

1. Getting started

One of your first steps is to gather the organizing team for the conference. Once your team is together, divide responsibilities. One person can have more than one area of responsibility, or several people can collaborate in the same task. You will find different areas of responsibility throughout this guide, but below you can find an example.

Different roles and responsibilities divided:

- Finances, budget, sponsorships
- Marketing, promotion and communication
- Social program planning
- Venue, catering and contracts
- Administrative duties
- Security and safety

Next suggested step would be to make a plan with deadlines to see what needs to be done and when. Additionally, find out what project management tools might be useful for you.

To help with the planning, you can conduct a strategic analysis. You can start with a method called 5 Ws where you answer the questions: why, who, what, when, and where. An analysis of the strengths, weaknesses, opportunities, and threats is also beneficial (SWOT analysis). In addition, stakeholder mapping and separately listing the objectives can be useful.

5 Ws:

Why? Why are you organizing this conference? What are the purpose and motives? How about the objectives?

Who? Who is the target group? What does their customer profile look like? How many participants are you expecting?

What? What is the format of the conference? What does the program look like? What activities are included in the program?

When? When does this conference take place?

Where? Where is it happening?

2. Choosing a date and a location

The convention is typically organized between late-July and mid-August since that is the holiday season in many countries. The convention lasts 3-4 days between Thursday and Monday. You do not have to choose one date right away. Having a few different date options will give you more flexibility with venue search among other things.

When deciding the dates for the convention find out if there are other events of interest for Rotex and Rotarian or special holidays happening around the same time. This could result in fewer participants due to other commitments. If there is a holiday or another big event happening in the city or area at the same time it could affect the logistics such as available services or prices.

There are probably many wonderful cities where to host the conference within your district. Here is what you should consider when choosing the location:

- Available accommodation options, event venues, and suppliers.
- Is it easy to reach from the international airport?
- Do you have someone from your organizing team living there or close by?
 - You will need to visit the venues and meet with suppliers.
- We want to keep the convention affordable so consider the prices. Smaller city that is still easily reached is a more affordable option than the major city in the region.
- It might also be helpful if the local Rotary Club or members are supportive of the convention.

Use the local tourist boards and councils, conference bureaus and other sources for information and help with the organization. They will most likely have tips and advice about venues, accommodation options etc. They might even be able to offer sponsorship.

3. Financial Planning

One of the first steps is to start creating a budget for the convention. We are not looking to make any revenue from this event, so the budget should be at its break-even point at the end. In the budget you can mark all the must have expenses and the items that would be nice but are not necessary. In case it seems like the budget is exceeding, leave out some of the “nice-to-have” things.

First create an initial estimation that lists all the costs and estimates the income. Evaluate and monitor the estimation throughout the process. The estimation could be updated when participation fees are released. Make the final estimate once participation numbers are known. Calculate the total costs and income.

Fixed and variable costs

The costs related to any convention can be divided into fixed costs and variable costs. Fixed costs are costs that will remain the same regardless the number of participants, for example the venue. And variable costs will be calculated per participant and therefore depend on the number of participants, for example catering.

Writing down the fixed and variable costs is a good way to start creating a budget for the event. See below an example list of fixed and variable costs and start working on the budget.

Note: The list below is not an exclusive list, there might be other costs that haven't been considered here or some costs are not relevant to the conference this year. The items are also quite broad so the actual budget should be more detailed. This just to give an idea of different costs that are possible.

Fixed costs

Convention venue

- Venue rent
- Audio visual equipment rent
- Security
- Building the conference and cleaning up
- Event staff salaries or some compensation for volunteers
- Venue decorations and sign
- Office supplies

Speakers and performers

- Salary for possible performers
- Water for the speakers
- A certificate, gift or other form of appreciation

Other

- Marketing and promotion
- Transportation

Variable costs

- Catering for lunches, dinners and coffee breaks
- Possible fees for the bank from ticket payments
- Conference bags and materials
- Accommodation
- Transportation
- Social program
- Unexpected expenses +5%

Note: Speakers in the sessions are members of our community who participate in the conference, so they don't get compensation for speaking. But you should give them some type of thank you gift.

If you decide to have performers from outside our community (e.g. local artists) be prepared to pay their fees unless something else is agreed.

Income

Normally most of the income for a conference comes from ticket sales, but also sponsorships and grants can make a big portion of the income.

Your Rotary District(s) is not required to offer you any financial support, but make sure to ask if that is a possibility. You can also ask the clubs and even local Rotarians to support the conference. These Rotarians might own businesses who are willing to sponsor the conference. The support/sponsorship received is not necessarily money but services and products for free or for reduced price. Make sure to utilize your Rotary Network!

It is possible to get support from the city where the organization is organized. Reach out to the tourist board or event/convention bureau to find out more. If financial support is not available, there will be other ways how they might be sponsor or help with the conference. Having an international convention in the city/area is a good incentive for them to support you!

There might also be other local funds and organizations who can offer financial aid for the event. Do your own research to see if there is anything available in your area for this type of event.

Sponsorships from local or international companies are one good source of income. Again, remember that not all sponsorships are monetary, maybe you get a company to provide you with the drinks for evening parties with discount in exchange for the visibility in the

event. Think carefully what type of companies might be interested and benefit from visibility in our event. In 2018 for the conference in Taiwan, they managed to get sponsorship from Emirates Airlines as a discount code for participants.

Example from Taiwan 2018 Conference

For the Taiwan conference they managed to get a remarkable amount of sponsorships. 52% of the income came from the sponsorships, and the rest (48%) from ticket sales.

Contracts and other advice

You may need to sign some contracts before you know the exact number of participants. So make sure that you understand what are the possibilities to reduce and add people and how does it affect the costs. Also understanding the cancellation policy is important, you need to know if it is possible to cancel and until when. Also ask when the final headcount is needed to see if your ticket sales have ended by then.

Make sure you know when the payments need to be made. You need to consider if you have opened ticket sales, so you have some money to pay or whether you have managed to get money elsewhere by then (sponsorships).

Take into account the local laws and regulations on taxation. If you haven't already, you should register your Rotex association locally as a non-profit. This will usually mean that you do not have to pay taxes on the sponsorships you get. Registering your Rotex association will also most likely also be necessary in order to open up a bank account.

4. Finding convention venue

You should start looking for the venue as early as possible since most venues book up early on. The venue selection process roughly consists of the following steps:

1. Start by figuring out what are the requirements for the venue.
2. Search and list available venues.
3. Visit venues that meet the requirements.
4. Analyze and compare the visited venues.
5. Negotiate with event venues.
6. Make a decision.

What type of venue are you looking for?

Here are some questions to keep in mind while looking for a venue:

- How big of a venue is needed for all the participants? How many separate spaces is needed for the breakout sessions? Is there space for networking, registration, and breaks? How about space for staff and storage?
- Is the venue wheelchair accessible?
- What equipment is required for the conference? Are they included in the venue rent or do they need to be outsourced? (For example: audio-visual equipment, internet)
- Can the venue accommodate/provide catering for lunch and coffee breaks?
- Can the venue accommodate for the social program as well or is separate venues for social program needed? If needed other venues are needed, can they be easily reached?
- The location of the venue considering the accommodation(s). Is it easily reachable or is transport needed?

Since the cost of the venue takes up a big portion of the event budget, try to do find an affordable but a functional venue. Consider hotels, conference and congress centers as well as universities and local schools.

How to search for venues?

When searching for a venue, you can do that independently, ask advice from the local travel agency or convention bureau, or you can use a venue search agency. Whether you use an agency or find the venue on your own, consider the criteria for the venue first.

By the end of the search process, you should have a list of potential venues that are available on the convention dates and meet the criteria with initial pricing. Choose which venues you want to visit and schedule a visit. Compare the venues and negotiate a good deal.

5. Venue and site plan

Once you have chosen the venue, start thinking about the venue layout, amenities, decoration and signs.

What spaces are needed?

The lobby should accommodate the registration area and info desk or info board to provide information about the program. With the info desk/board you can also have information desk with brochures about local sights, restaurants and so on. People will most likely spend the breaks in the lobby, so it must be spacious enough. A spot where to get water would be nice. Also cloak room might be needed if convention venue is different than accommodation.

Main session room/hall is the biggest room where all the plenary sessions will take place, so it should fit all the participants at once. This is the room that you should decorate. In this room good audiovisual equipment is needed.

Other session rooms are needed for the simultaneous breakout sessions. These do not need to fit all the participants. These rooms also have less need for audiovisual equipment. In these sessions microphones are not always necessary but projectors are.

Clearly indicate the bathroom locations, and make sure they are in good condition. If there is room in the budget to add little baskets for needed things (plasters, period products, hairspray etc.) that will enhance the experience of the participants.

You will need storage spaces for conference bags, decorations and other materials. And some space to prep them.

Room or a space for the organizers to handle convention related tasks during the convention. In here internet access and computer is needed along with some office supplies. Make sure you have a possibility to print something either here or somewhere else in the venue. If possible and needed the space can be used to store some extra materials.

Staff room is also important. The conference staff needs a place to store their belongings and have their breaks.

Signs and decorations

You can decorate the convention venue to create more atmosphere. A background for photos is a good idea. What comes to decorating, use your imagination within the limits of your budget. The most important areas to decorate are the lobby and the main session hall.

Different signs are extremely important and should not be forgotten about. Make the signs look professional and nice, you could include the convention logo in them. Place them so that a crowd won't block them (above heads). Outside you should have signs at the entrance and to mark possible parking area. Inside the venue there should be signs to guide

the participant to different session rooms (rooms should be named) and other spaces such as toilet and lunch. Signs should be placed at every point where you can go to wrong direction. Even if there is no possibility to get lost, but the journey is quite long, have some signs on the way. You can have one bigger sign at a central area that shows all the different spaces in the map or as directions. Having the conference program printed next to it is also a good idea.

6. Accommodation, catering and transportation

Accommodation

The accommodation can be organized by the organizers. If accommodation is organized, there should also be a ticket type available that doesn't include the accommodation. Most conveniently the accommodation and conference venue are the same venue, but they can also be separate venues. If they are separate venues and are not walking distance from each other, transportation should be provided.

It is also possible that accommodation is not organized by the organizers and is the responsibility of the participants. In this case, you should offer some recommendations for accommodation options. You can also ask if the local hotels are willing to give a special price or discount code for the participants.

If accommodation is included, make sure to have a written offer from the hotel that states the reservation fee and the cancellation policy. It is often easier to first book less rooms and add more to the reservation later than to cancel many extra rooms.

Make sure you have agreed with the hotel how and when to deliver all the necessary information. This typically means a list with all the reservations, including any special requests (allergy rooms, accessible rooms) and who is staying with who. Also provide the hotel with the conference program, information about any possible transportation and contact details in case they need to get in touch with the organizers.

Catering

In the convention nearly all meals should be included. During the conference day offer lunches and coffee breaks. Dinners and cocktail events are part of the social program. When planning for the menus try to make it variable so meals are not too similar. This is the time to show off the local cuisine!

Also remember to consider special diets and allergies. Make sure that everyone will have something to eat. And when serving the food make sure that the allergen information is available in English.

Remember to make the arrangements with time and have written contracts. Make sure that you are aware about any cancellation policy, what is minimum amount of people, if the price is different depending on the number of people and when the final participant count (with allergies and special diets) must be delivered.

TIP! Lunch and coffee breaks might be possible to arrange and be included in the package from the venue.

Transportation

If there is a need for transportation for example for social program or between the accommodation and convention venue, it is recommended that the transportation is provided. In

case accommodation is not included, then everyone can be expected to get around on their own. Unless a part of the social program happens right after the scientific program in a different venue.

If transportation is used, take into account the time that is required for people to get in and out of a bus when creating schedules.

7. Conference Program

The convention program consists of the scientific program and the social program. Rotex International will provide the content for the scientific program so at this stage close collaboration is required. The organizing committee will plan the schedule for the program. They are also in charge of the registration, meals, and planning the social program. Below you can see of the program in the convention in Taiwan in 2018 which can serve you as an example.

Convention program in Taiwan 2018

Day1	Day2	Day3	Day4
● 12:00 - 16:00 Registration	● 07:30 Morning call	● 07:30 Morning call	● 07:30 Morning call
● 12:30 - 16:00 Rotex bootcamp	● 08:00 - 09:00 Breakfast	● 08:00 - 09:00 Breakfast	● 08:00 - 09:00 Breakfast
● 16:00 - 17:00 Check in	● 09:00 - 12:00 Plenary 1 - Grand opening	● 09:00 - 10:15 Plenary 2	● 09:00 - 12:00 Plenary 4 - Closing
● 17:00 - 18:00 Opening	● 12:00 - 13:30 Lunch	● 10:15 - 10:45 Networking break	● 12:00 - 13:30 Lunch
● 18:00 - 22:00 International evening	● 13:30 - 14:45 Breakout session 1	● 10:45 - 12:00 Breakout session 3	
	● 14:45 - 15:15 Networking Break	● 12:00 - 13:30 Lunch	
	● 15:15 - 16:30 Breakout session 2	● 13:30 - 14:45 Breakout session 4	
	● 16:30 - 17:20 Prep gala dinner	● 14:45 - 15:15 Networking break	
	● 17:00 - 17:30 Transport to gala	● 15:15 - 16:30 Breakout session 5	
	● 17:45 - 21:30 Gala	● 16:30 - 18:00 Plenary 3	
	● 21:30 - 01:30+1 After Party	● 18:00 - 22:00 Networking night	

Scientific Program

The scientific program consists of plenary sessions and breakout sessions. You as the organizer are expected to draft the schedule but the scientific program will be decided together with Rotex International.

Plenary sessions do not have any simultaneous sessions happening at the same time, everyone is meant to participate in them. In the plenary sessions we will have keynote speakers talking about relevant and interesting topics.

The breakout sessions have several different sessions happening at the same time and the participant can choose the one they are most interested in. Previously the different breakout sessions were divided into categories based on the experience level of Rotex: beginner, intermediate, and advanced.

Social Program

Use your creativity when designing the social program. Every day there should be some social event, usually they are dinners. The social program allows participants to network and make friendships in more casual setting.

In these events you can highlight the local culture through activities, performances and food. Options include welcoming get-together, international night, gala, networking event, excursions, after parties and so on.

TIP! In some countries the city hall provides a civic reception to bigger conferences to welcome the participants to the city and show appreciation.

Post-trip

Previously after the convention a post-trip has been organized. This is not a mandatory part of the conference but would definitely be appreciated by the participants. If you want to provide one, consider different options and different travel agencies.

8. Registration and tickets

Ticket sales and types

Before starting ticket sales, you should plan the budget for your event. The ticket price will depend on the costs of the event as well as any possible sponsorships and aids you receive.

In the ticket the conference fee, social program activities and meals should be included. Accommodation and post-tour should not be automatically included but to have ticket options with and without them.

Example of different ways to divide tickets into different types:

1. You can have different tickets for Rotex and for Rotarians. Rotarians can afford to pay more for the conference so their tickets can be slightly more expensive.
2. What is included in the ticket? There could be a ticket for the convention only, convention + accommodation, and conference + accommodation + post-tour, conference + post-tour.
3. Ticket price varies based on when the booking is made. The price will increase closer to the convention. You could have 3-4 stages. For example:
 - a. Super Early Bird / Hardcore price for the first x amount of people to book.
 - b. Early registration
 - c. Normal registration
 - d. Late registration

The benefit of the ticket price increasing closer to the event is to get people to sign up as soon as possible. The earlier people register, the easier it is for you to do the arrangements since you have an idea of participant number. You will also make some income sooner which is needed to pay any reservations and other fees. The early bird tickets that are only available for a few people will encourage these people to invite their friends as well. Make sure that the price difference between different stages is significant enough for people to feel that there is value to register earlier.

Previously the times when ticket sales opened have varied. It would be good to open the registration about one year before the convention.

Example of ticket prices for Taiwan 2018 (in euros)

Ticket	Hardcore	Early Bird	Normal	Last Call
Dates	(First 30 to register)	July 1 – October 31 2017	November 1 2017 – April 30 2018	May 1 – June 30 2017
Convention Only	-	120 €	150 €	180€
Convention + 4 days post trip	-	300 €	300€	350€
Convention + 8 days post trip	300 €	370 €	450€	500€

Example of ticket prices for Brazil (in Brazilian reais)

Rotex	Early Bird	Normal	Last Call
	17 Mar - 15 Apr	16 Apr - 13 May	14 May - 10 Jun
Convention Only	R\$ 750	R\$ 800	R\$ 850
Convention + Hotel	R\$ 1150	R\$ 1200	R\$ 1250
Convention + Hotel + Extra Night	R\$ 1400	R\$ 1450	R\$ 1500

Rotarian	Early Bird	Normal	Last Call
	17 Mar - 15 Apr	16 Apr - 13 May	14 May - 10 Jun
Convention Only	R\$ 850	R\$ 900	R\$ 950
Convention + Hotel	R\$ 1250	R\$ 1300	R\$ 1350
Convention + Hotel + Extra Night	R\$ 1500	R\$ 1550	R\$ 1600

Registration

Use an online registration form where participants can register and make their payment. There are many different platforms to choose from, so do careful research before choosing one. The fees may vary a lot.

TIP! Contact Rotex International's IT Committee for support with the registration platform!

The registration form should include at least the following information:

- Personal Information: name, address including country, email, phone number with country code, and gender.
 - Consider if gender information is necessary, for example for assigning roommates in the accommodation. If it is included remember to make it inclusive!
- Rotex/Rotary related information: Rotex/Rotarian, country, district, club, and position.
- Ticket info: select between different ticket types and possible extras (post-trip).
- Payment information and cancellation policy: is payment made now, can it be made in different parts, how to cancel participation, what is the refund policy.
- Special notes: allergies or other special requirements

After registering and payment is done, send out a confirmation email that includes some basic information, selected ticket, cancellation and refund policy (or link to it).

Liability, insurance, and refunds

In the registration and with the purchased tickets make sure to include information about liability, insurance, and refunds. You as the organizer are not responsible for any accidents that happen to the participant. We also reserve the right to cancel the event, for example if participation is too low. Add information about how the refund works in case we have to cancel the event but also in case the participant wants to cancel.

Refund policy could look something like this:

- Until a certain date full refund (minus possible administration fees)
- After that 50% (or some other %) until after a certain date cancellation is no longer possible

Registration on site

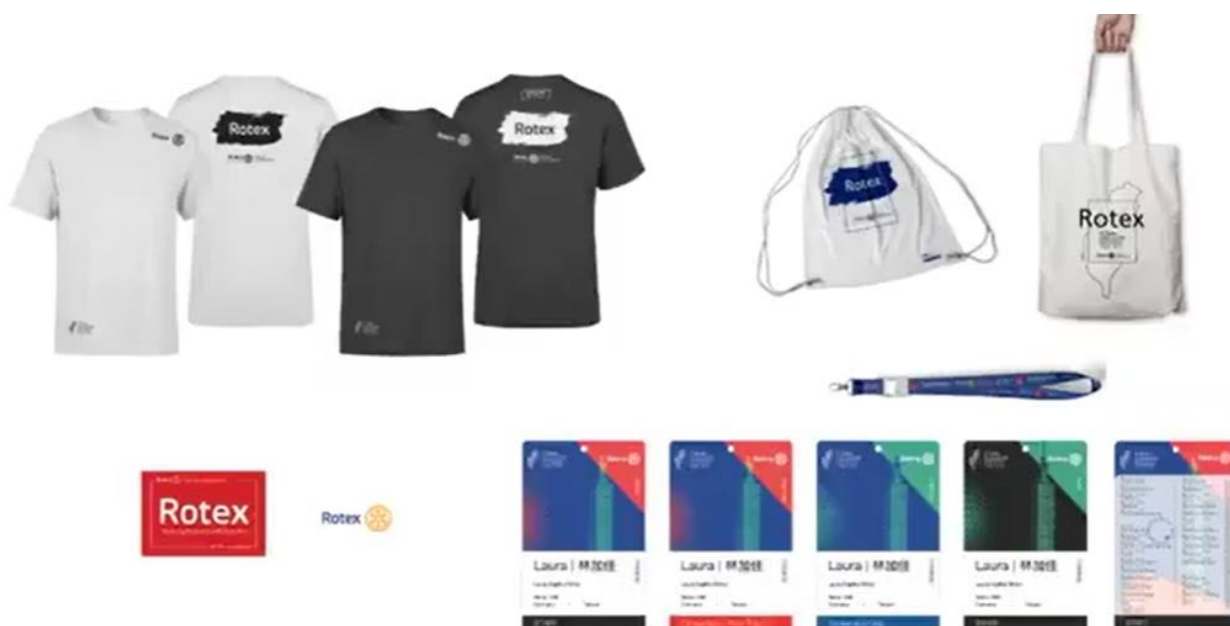
Consider how registration is done at the event. Do participants need to show a ticket or do you have a list with the names, and they register with their ID's.

During the registration participants are given conference bag that includes some materials. This should at least include nametags, lunch vouchers (if needed), conference program booklet and possibly other flyers with relevant information. Often there are other complimentary gifts with conference logo as well such as notebooks, pens, pins, a t-shirt and so on. Use your imagination but consider the budget.

When getting the nametags consider the usability, lanyards can be used with any clothes. A pin or a clip can make holes in clothes or isn't so practical to wear depending on clothing. It is good to reserve some extra blank ones in case someone loses their nametag. When designing them pay attention to how the names are presented in the name tag (make sure they are easy to read). What other information should be included in the name tag (country, district, club name, position in Rotary).

The conference program booklet should cover all the information the participant might need. It includes basic information about the convention and the complete program of the convention including social program and locations, possible dress codes and other special notes. A venue map might also be useful. Include welcoming words from the organizers or the president of the organizing committee and from Rotex International. Also sponsors should be mentioned here. Don't forget about contact information of the organizers and instructions in case of an emergency.

Merchandise from Taiwan 2018



9. Marketing and communication

Marketing

A good way to reach Rotex is through social media. Your main marketing channel should be your own Instagram page, which should be named the following way: rotexcon + year, eg. rotexcon2020.

Rotex International has their own social media accounts where promotional material should be shared as well. Rotex International PR Committee will create some posts but also contact them to further discuss any collaboration. Tag @rotexinternational to your posts and stories, and they will be reshared in our social media channels.

Rotex International newsletter system will be used to promote the convention. The PR Committee will include conference updates in our regular newsletters. If you wish to send out any special messages through our newsletter, contact the Head of Networking of Rotex International.

National Rotex umbrella associations can be contacted to reach their members through their channels. You can also contact individual clubs to bring the convention to the attention of Rotex. Ask Rotex International for their contact lists.

There are also more unconventional ways to reach Rotex. Several WhatsApp groups exist that have international Rotex, you can send a message to those groups to promote the conference. But remember to not spam these groups! They are not meant to be your marketing channels, but ways for you to reach Rotex and redirect them to follow your social media.

To reach Rotarians, you can contact EEMA, NAYEN, LATIR and so on to see if they can share our conventions through their platforms. You can also reach out the Rotary districts in your country and neighboring countries to promote the convention for their Rotarians. If you participate in the Rotary Conferences, consider setting up a small booth or having some flyers to distribute.

Announcements

There are some official public announcements during the conference planning period that you could follow, these are called the first announcement and second announcement.

Once the location and dates have been confirmed, send out a first call announcement. In it include the name and theme of the convention. Also have a link to the website and contact information. If you have already decided when ticket sales open, you should include information about that as well.

Once you have the preliminary program done, send out it out for everyone as the second announcement. In the second announcement include welcoming words from the organizers, and you can also include welcoming words from Rotex International. It should have information about ticket prices and how to register. Also add information about how to arrive, the possible accommodation options to book from (if not included in the ticket) and any discount deals with accommodation or airlines.

The preliminary program is the main part of the second announcement, so you can highlight some of the keynote speakers with their bios. Don't forget to talk about social program and post-tour as well. You could also include an application form for anyone who would like to be a speaker or host a workshop.

You can send out some materials that attract people to the location, or an introduction of the organizing committee or anything you can come up with. We can also host online meetings to promote the convention, these could be Q&A sessions, or presentation from the organizers.

Media

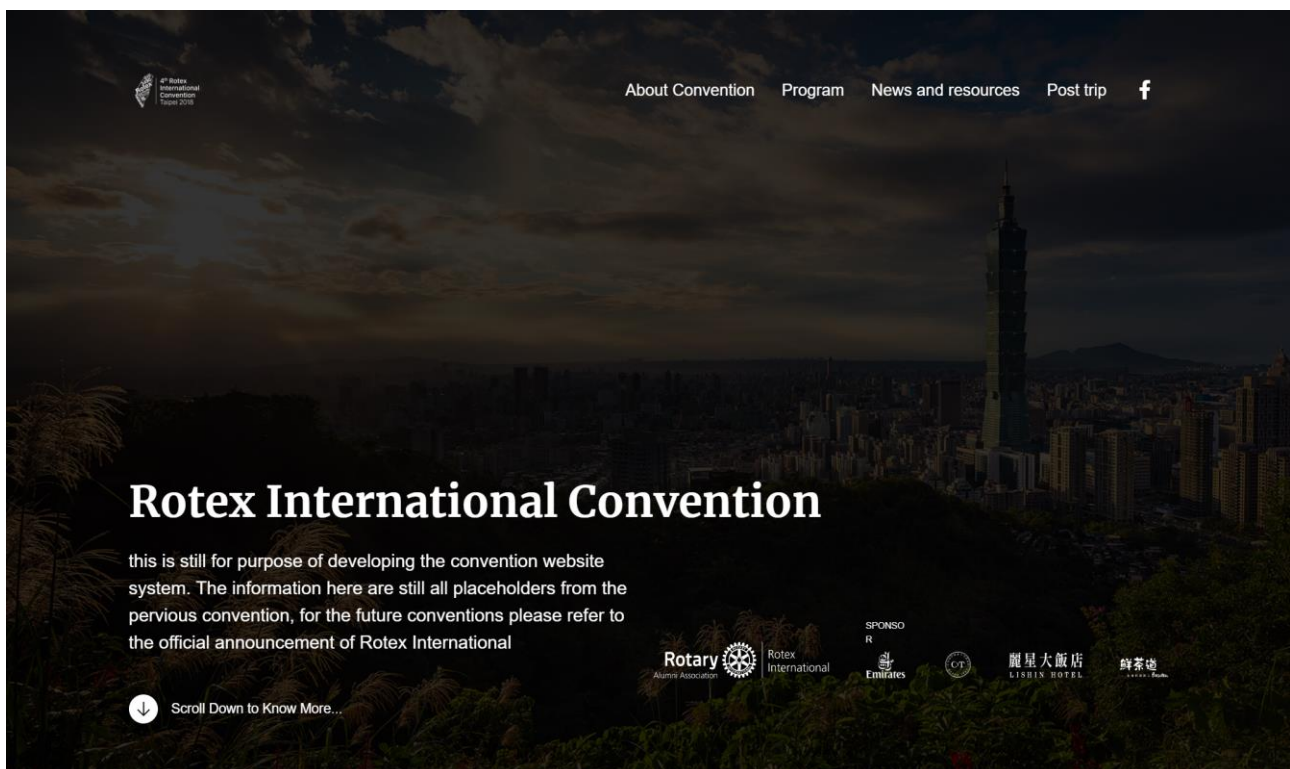
It is not necessary to release information about the conference to the media, but in case you decide to do so, make a plan for it. We are not looking for participants outside of our community, so it is not done to attract more participants, but it might be interesting for the local media to know about it and gain awareness for the RYE Program.

Communication

Website

Rotex International IT Committee will be able to provide you with a conference webpage. You will receive support and guidance with the management of the website. The address of the website is: <https://convention.rotex.org/>

Example of the convention website



Have all the information about the convention on the website. This for example includes:

- Conference program, information about the different sessions and speakers
 - Highlight the keynote speakers
- Social program
- A hello from the organizing committee and Rotex International
 - Introduction to the organizing team members and their responsibilities (if you want to)
- Basic information about the convention
 - Dates, location and venue, theme and so on
- Additional information about the city
 - How to get there from the airport, sights, history and other interesting information for tourists
- Tickets and registration
 - Different ticket types and their prices
 - How to register and when
- Contact information, social media and newsletter links

Email and newsletter

You will also have access to an email address created for the Rotex International Convention, convention@rotex.org . Please use this email address for any official communication to Rotex members, and as a way for them to get in touch with you. You can also setup a newsletter to communicate with the registered participants.

10. Administrative duties

Besides contracts and other paperwork, the administrative duties also include filling out forms for local authorities and finding staff to work at the event.

Permissions and notifications

Depending on your country, different permissions and notification are needed for the local authorities. Do your research to make sure what type of paperwork you need to fill in and when.

Conference staff

You will need people, staff, to help out at the event because you most likely won't be able to manage it all by yourselves. The staff can be hired or they can be volunteers. The volunteers can be members of your Rotex association, or they could be for example hospital-ity students from a local university etc. If you have volunteers, remember that it is good manners to cover their costs (transportation for example) and provide them with meals, snacks, and water.

You will need staff for:

- Registration: taking care of the registrations and hand out conference bags and other material (when registering is complete, they can move to other tasks)
- Information desk: offering information about conference program, social program, tours etc. Answers any questions participants might have. If the convention is smaller scale with not so many participants, an online communication channel could work instead on an info desk.
- Conference room assistants: making sure presentation and audiovisual aspects are in order, making sure the session room is clean and organized as it should be (seating arrangement), making sure speakers have water available, making sure the decorations are in order. You could also have separate staff for the audiovisual aspects.
- Host: presenting all the speakers, giving information in between sessions. Should be extremely familiar with the convention.
- Other: photographer, someone with a car to run errands, if you have VIP's (RI president for example) a host for them to guide them into their seats etc.

The roles above can be filled with volunteers and maybe members of your own team if possible. But remember that your team members will have lots of task during the convention days, and when they are not busy, they might want to enjoy the convention as well. You will constantly need to have someone alert in case any problems arise with the program or the venue to solve them.

It is also good to have someone from your team to be a host for the speakers. That should be someone who knows where and when everyone is presenting, can guide them and answer their questions. They should be in charge of getting all the materials from the speakers, preferably before the convention, and making sure the person responsible for the presentations has all the material.

Training the staff

All the staff need to be briefed about the whole convention. They need to know who in the organizing committee oversees what. It is important that the staff knows who to contact in case there are issues. Coordinate the tasks well and decide roles with time so the staff have the opportunity to familiarize themselves with their roles.

Make sure they are also trained in customer service and know type of language should be used. Also think about how the staff dresses up so they can be identified from the participants. They could wear their own clothes that are similar to each other or they can be provided with a shirt.

11. Risk management and safety

The security and safety cover the venue and materials as well as the participants. To make sure that your event is safe consider the following three things: risk assessment, emergency plan and security measures at the event. Local authorities usually have requirements related to safety, especially with bigger events.

Risk assessment

In the risk analysis, list all the possible risks that the event could encounter. Besides safety, you can also consider different scenarios that could go wrong. Think about who these risks can impact as well as how, why, and when they could happen. Consider a wide range of risks including safety of the people, accidents and injuries, fire safety, environmental catastrophes, and cyber security among others.

Online you can find good examples and templates of risk assessment. Below there is a simple example on how to conduct the assessment.

Risk Assessment

Risk	Probability	Severity	Action
What could happen?	How likely it is that it happens? Scale 1-3 or 1-5.	How bad would the consequences be? Scale 1-3 or 1-5.	How to prevent this risk? What do in the case it happens?

Emergency plan

When you have done the risk assessment plan, make an emergency plan based on those risks. What would you do in different situations and how can they be handled so that participants are safe. Figure out what safety measures exist in your venue such as emergency exists, first aid equipment and fire safety equipment.

Security measures at the event

Depending on the size of the event, different security measures may be needed. Some of the security measures might be provided by the venue but some you might need to figure out on your own. Consider the need for guards, surveillance equipment, and access control.

12. Evaluation and feedback

For the success and improvement of Rotex International Convention it is very important to evaluate the conference and gather feedback.

The evaluation is done by the organizers to evaluate what worked and what did not. Also ask for feedback from anyone else involved in the organization such as Rotex International, event staff or volunteers, and speakers. All this information will be very helpful for the future organizers. In addition, an evaluation of the finances and budget is important information to report.

You should prepare to send a feedback survey to everyone who attended the conference. In the feedback survey you can for example ask about the following topics:

- Scientific and social program
- Accommodation
- Food and beverages
- Venue
- Value for money
- Registration process
- Satisfaction with the information provided before and during the conference