

IEEE Southern Alberta PES/IAS Chapter
Technical Seminar Coordinator's Checklist

This checklist applies to evening seminars. Consult Chapter Chair for process for tutorials and courses.

Approx 6 months before event:

1. If the seminar is a joint-event with the Northern Canada Section (NCS), contact *NCS Chair* to determine if they will be holding the event in both Edmonton and Fort McMurray.
2. Contact speaker, introduce yourself, and explain the format of the event. Confirm his/her availability and attendance at all locations (Calgary, Edmonton, Fort McMurray; as applicable).
 - a. A Chapter Committee member may be able to introduce you to the speaker.
3. Apply for DLP (Distinguished Lecturer Program) funding *if applicable*.
 - a. Details for PES: <http://www.ieee-pes.org/pes-communities/chapters/distinguished-lecturer-program>
 - b. Details for IAS: <http://ias.ieee.org/chapters-membership/distinguished-lecturer-program.html>
4. Prepare event budget and work with PES/IAS committee to procure sponsorship. Note that budget templates, and other forms, are available on the "Resources" page of the IAS/PES website: <http://sas.ieee.ca/pesias>

Approx 3 months before event:

5. Begin event promotion
 - a. Get final abstract, biography and photo (head-shot) from speaker.
 - i. Inform the speaker about IEEE's requirements for non-commercialism.
 - ii. Arrange to review the speaker's presentation for commercialism 2 weeks prior to the seminar.
 - iii. *For out of town speakers:* ask the speaker if their company will be covering their travel expenses. If yes, the speaker's company will be recognized as an event sponsor.
 - b. Prepare meeting notice (flyer) from speaker information.
 - i. Use samples from previous events.
 - ii. Mention that a *light* meal is provided for attendees.
 - c. Post to vTools registration system.
 - i. Contact the *vTools Coordinator* and request that a vTools registration page is created for the event. Send a copy of the meeting notice, on which to base the vTools page. Set registration close date to 11.55pm on the Wednesday before the seminar. Limit the number of registrations to the venue capacity minus the number of sponsorship seats (1 section of the UofC Downtown Campus accommodates 120 people).
 - ii. Once the vTools page is set up, add the vTools link to the meeting notice.
 - d. Send meeting notice to *Chapter Chair*, to prepare the eNotice.
 - i. Typically 3 Emails will be sent out to promote the event.
 - e. Send a copy of the meeting notice to the *NCS Chair*.

Approx 1 month before event:

6. Arrange for catering.
 - a. Contact *Walter Tomandl at Great Events Catering*, and tell him you are coordinating the next IEEE event at the UofC Downtown Campus, and the event date. He will provide a selection of event menus to choose from.
 - b. Select a menu, and provide a preliminary estimate of number of meals. A preliminary estimate of 60 is usually good, with 2/3 regular and 1/3 vegetarian. The number of meals can always be increased as registration increases, but we are committed to paying for this minimum number first provided.
 - c. Within a couple of days, Walter will send you a document with the catering arrangements (menu selected, number of meals, wait-staff charges, etc.) for you to review. If there are any errors or omissions (i.e. if vegetarian meals are omitted), let Walter know.
7. Work with speaker to confirm travel and hotel arrangements, if required.
 - a. *Tim Driscoll* can assist with hotel bookings.
8. Arrange to get Thank You plaque for speaker, from *Tim Driscoll*. Provide Tim with the exact seminar title, speaker's name and seminar date.
9. Arrange for 3 student volunteers to man the registration table.
 - a. Contact the *Univ of Calgary Student Branch Chair*, and request 3 volunteers for the evening of the seminar. Provide the seminar date, and request that volunteers arrive at the venue at 5.30pm. Student volunteers will receive complimentary admission to the seminar.

Two weeks prior to the seminar

10. Contact the *vTools Coordinator*, and request that s/he emails the people whose registrations are incomplete ("Waiting for payment").
11. Review the speaker's presentation for commercialism.
12. Ask speaker if they will be making a pdf of their slides available to attendees after the presentation. If yes, past presentations are publicly available on the chapter website.
13. Invite the speaker to lunch on the day of the seminar, if they are available. Invite the Chapter Chair; if Chair is unavailable, invite your Seminar Advisor.

On the Thursday prior to the seminar

14. Request the final vTools registration list download from the *vTools Coordinator*.
15. Prepare the final registration list.
 - a. Remove duplicate "Waiting for payment" entries, and add the sponsorship seats and student volunteers.
16. Provide the final number of meals (regular and vegetarian) required to *Great Events Catering*.
17. Prepare the attendee nametags. The nametags template and instructions on template use are available on the "Resources" page of the website: <http://sas.ieee.ca/pesias/>
18. Print/photocopy seminar evaluations, *if necessary*. Evaluation form template available on website.

On the day of the seminar:

19. Host the speaker at lunch, *if applicable*.
20. Be sure to bring name tags, registration list and evaluation forms to the seminar.
21. Organize registration tables with signs A-M, N-Z. Inform student volunteers of their duties.
22. Work with speaker to ensure laptop and AV system in presentation hall is working.
23. Immediate prior to presentation, introduce the speaker.
24. After presentation
 - a. Thank speaker and present plaque.
 - b. Inform audience slides will be available on website (sas.ieee.ca/pesias), if applicable.
 - c. Ask audience to complete evaluation forms.
 - d. Obtain copy of the slides from the speaker, if applicable.
 - e. Provide the registration desk list to the *Chapter Chair*.

Post-seminar follow-up

25. Tabulate results of evaluation forms, using the event summary template available on website.
26. Send a thank you email to the speaker, and include a copy of the evaluations summary.
27. The *Chapter Chair* will file the L31 Meeting Report.
28. Tabulate the suggestions for future seminars, and send to *Chapter Secretary*.
29. Complete financial summary spreadsheet and forward to *Chapter Treasurer*.
 - a. Obtain actual seminar revenues from *Section Treasurer*.
 - b. Obtain actual seminar expenses from *Chapter Treasurer*.
30. Complete any paperwork for DLP program, *if necessary*.
31. Forward pdf of slides to *Chapter Webmaster*, if applicable.
32. Present a summary to the Chapter Committee at the next meeting following the seminar.
 - a. How many people attended, overall feedback scores, revenue/expenses/surplus/loss

Table 1: Contact List

	Responsible	Name	Email
Edmonton/ Fort Mac contact	NCS Chapter Chair	Carl Lam	cflam@suncor.com
V-tools set up	vTools Coordinator	Richard Loiselle	rloiselle@suncor.com
Email notices	Chapter Chair	Shan Pandher	shan.pandher@ieee.org
Student Volunteers	Student Branch Chair	Jamiul Alam	imjalam@gmail.com
Post-event financial follow-up	Section Treasurer	Dale Tardiff	dale@innovativepower.ca
	Chapter Treasurer	Tim Driscoll	tim.driscoll@ieee.org
Suggestions for future seminars	Chapter Secretary	Vivek Tadiparty	vivek.tadiparty@stantec.com
Post slides on website	Chapter Webmaster	Ken Martyn	ken.martyn@jacobs.com

Venue	University of Calgary Downtown Campus	Beth McCoy	(403) 210-7311 (403) 560-3512	beth.mccoy@ucalgary.ca
Catering	Great Events Catering	Walter Tomandl	(403) 256-3801 (403) 256-7150	walter@greateventsgroup.com