

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 Chapter 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. Create a vTools registration page, based on the meeting notice. Set registration to close at 11.55pm on the Thursday before the seminar. Limit online registration to 75. Contact the *vTools Coordinator* if you have questions or need assistance.
 - 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. Work with speaker to confirm travel and hotel arrangements, *if required*.
 - a. *Tim Driscoll* can assist with hotel bookings.
7. Arrange to get Thank You plaque for speaker, from *Tim Driscoll*. Provide Tim with the exact seminar title, speaker's name and seminar date.
8. Obtain blank nametags, seminar evaluation forms and laminated signs from previous seminar coordinator.

Two weeks prior to the seminar

9. Monitor the vTools online registration regularly. Email people whose registrations are incomplete ("Waiting for payment"), and request they register again to guarantee a space at the seminar. Cancel incomplete or duplicate registrations, to ensure spaces are not being consumed by multiple unsuccessful attempts.
10. Review the speaker's presentation for commercialism.
11. 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.
12. Invite the speaker to lunch or dinner on the day of the seminar, if they are available. Invite the Chapter Chair; if Chair is unavailable, invite your Seminar Advisor.

On the Friday prior to the seminar

13. Download the final registration list from vTools.
14. Contact *Chapter Chair*, and obtain list of complimentary registrations (sponsors, new Senior Members, etc.).
15. Prepare the final registration list.
 - a. Remove duplicate "Waiting for payment" entries, and add the complimentary seats.
16. Contact *Michael's Pizza* before 2pm, and place order. See *Table 2*.
17. Purchase items listed in *Table 3*. Check with coordinator of previous seminar whether there are any items left over from the previous event, and reduce quantities accordingly.
18. 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/>
19. Print/photocopy seminar evaluations, *if necessary*. Evaluation form template available on website.

On the day of the seminar:

20. Have *Section Treasurer* phone *Michael's Pizza* prior to noon, and provide credit card payment information for order.
21. Host the speaker at lunch or dinner, *if applicable*.
22. Be sure to bring tape, laminated signs, name tags, registration list and evaluation forms to the seminar.
23. Place laminated signs for directions to auditorium.
24. Organize registration tables with laminated signs A-M, N-Z.
25. Work with speaker to ensure laptop and AV system in presentation hall is working.
26. Immediate prior to presentation, introduce the speaker.
27. After presentation
 - a. Thank speaker and present plaque.

- b. Inform audience slides will be available on website (sas.ieee.ca/pesias) within 2 weeks, if applicable.
- c. Ask audience to complete evaluation forms.
- d. Obtain copy of the slides from the speaker, if applicable.

Post-seminar follow-up

- 28. Tabulate results of evaluation forms, using the event summary template available on “Resources” page of Chapter website.
- 29. Send a thank you email to the speaker, and include a copy of the evaluations summary.
- 30. Provide a copy of the registration desk list to the *Chapter Secretary and Chair*. *Chapter Secretary* will file the L31 Meeting Report.
- 31. Tabulate the suggestions for future seminars, and send to *Chapter Secretary*.
- 32. Submit expense report to *Section Treasurer*, for any expenses you incurred. Expense report is available on the “Resources” page of the Chapter Website.
- 33. Obtain actual seminar revenues and expenses from *Section Treasurer*. Complete financial summary spreadsheet and forward to *Chapter Treasurer*.
- 34. Complete any paperwork for DLP program, *if necessary*.
- 35. Forward pdf of slides to *Chapter Webmaster*, if applicable.
- 36. 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
Help with vTools online registration	vTools Coordinator	Richard Loiselle	rloiselle@suncor.com
Email notices	Chapter Chair	Dave Hines	davehines@ieee.org
Thank-you plaques	Thank-you plaques	Tim Driscoll	tim.driscoll@ieee.org
Post-event financial follow-up	Section Treasurer	Vivek Tadiparty	vtadiparty@nemalux.com
	Chapter Treasurer	Kyle Surgenor	surgenor.kyle@gmail.com
L31 Meeting Report & Suggestions for future seminars	Chapter Secretary	Sidra Malik	stmalik87@gmail.com
Post slides on website	Chapter Webmaster	Mirza Baig	mirzadanishbaig@gmail.com

Table 2: Pizza Order

Vendor	Michael's Restaurant and Pizza 139 – 10th Avenue SW
Contact Person	Helen or John (403) 264-6731 or (403) 264-6732
Special Instructions	Order is to be delivered to TransAlta (auditorium in basement of T1 building) at 5:30pm on Monday of seminar.
Quantity	Description
<i>Note: 1 Large pizza serves 4 people. Quantities listed below are for 80 people; consult with Chapter Chair whether to increase quantities, based on number of people registered.</i>	
4	Large – House Special
4	Large – All Meat
4	Large – SFO with Chicken added
4	Large – Hawaiian
4	Large – Vegetarian

Table 3: Miscellaneous Supplies

Quantity	Description
<i>Note: Quantities listed below are for 80 people; consult with Chapter Chair whether to increase quantities, based on number of people registered.</i>	
100	8.75" Disposable Paper Plates
200	Dinner Napkins
6	12 packs of 355mL Soft Drinks – assorted varieties of Coke or Pepsi products
3	24 packs of 500mL Bottled Water