



**CATE**

Careers and Transition Education  
Association (Aotearoa) Inc.

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# CATE Conference Guidelines

*September 2016*

These guidelines should be used by the Organising Committee of each Conference. It follows on from Sections 12 and 13 of the ***CATE Procedures Handbook*** which covers:

- **Section 12: Expression of Interest in Holding Conference** and a **Statement of Purpose**
- **Section 13: Annual Conference Management**, including:
  - Responsibilities of National Executive, Conference Convenor, Conference Planning Committee & Event Management Company
  - Financial Considerations

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## 1) **CONFIRMATION OF HOST REGION AND VENUE**

- Regions who have presented EOI's will be notified at the end June. The successful region will then be contacted by the Event Management Company and the timeline will be instigated.
- Any and all venue confirmations, accommodation logistics and other conference details must be handled by the Event Management Company. These will be the only details that will be actioned at this point in time by the Event Management Company.
- The region will be expected to have a presentation ready for CATE Conference in November announcing the location and dates.
- All efforts should be made to maintain confidentiality of location until that time, including advising sponsors.

## 2) **CONFERENCE COMMITTEE AND ORGANISATION**

The make-up of the Conference Committee will vary according to its number of members. The following are guidelines:

- There are 5 key areas of responsibility under the banner of Conference organisation.
- There is one overall position of Conference Chair.
- The Conference Chair and the Event Management Director attend all meetings.
- Committee members report to the Conference Chair who reports to the National Executive.
- Non-Committee members may be co-opted for specific purposes at any time.

## **Position: Conference Chairman**

Principle Contact: For all Committee members, the National Executive of CATE and the Event Management Company

### Primary Tasks:

- To oversee all committee activities,
- To ensure that the objectives of the conference as established by the National Executive are met
- Oversee the selection of a suitable venue and decide best use of venue facilities
- Prepare a project plan.
- Allocate key tasks & responsibilities within the Conference committee.
- Prepare a budget, which includes a summary of registration fees that need to be charged.
- Set time lines and deadlines and advise National Executive.
- To serve as a focal point for communications between the Conference committee, the sponsors, the National Executive, and CATE membership.
- Report on a monthly basis to the CATE National President and to each meeting of the National Executive.
- Monitor and liaise with Event Management Company to ensure responsibilities and reporting deadlines are met as per Clause 13.4 of the *CATE Procedures Handbook*.

**Key areas of responsibility are as follows:**

### **A) Programme:**

#### Primary Tasks:

- To create the overarching theme of the conference and subsequent strands. This is then signed off by the National Executive. To investigate and confirm keynote speakers. (travel and accommodation logistics will be managed by the Event management Company)
- Review abstract submissions and finalise full conference programme.
- Ensure that programme structure is balanced and meets the statement of intent as set out by the National Executive.
- Ensure that technical support will be available

#### Resource timing:

- Very busy in the early stages,
- busy once abstract submissions close and
- busy close to conference as workshop/abstracts speakers drop out

## **B) Sponsorship:**

### Primary Tasks:

- To create sponsorship document using templates provided
- Use database of past sponsors and update with potential new sponsors
- To maintain current sponsorship contributors and to grow the sponsorship base.
- Contact all past and potential sponsors to gather interest. Personally by phone if relationship exists or email.
- Ongoing follow up to gather confirmed sponsors
- To develop good relationships with sponsors and maintain communication during Conference itself.
- To ensure that sponsorship gained supports the overall purpose of the conference.
- Once sponsor confirms the Event Management Company will take over logistics, contracts, invoices etc

### Resource timing:

Sponsorship is perhaps the most time consuming role as it starts at the previous year's conference and continues through till current conferences completed.

## **C) Communications and Public Relations:**

### Primary Tasks:

- Prepare and monitor all promotions for the conference. Including and not limited to delegate information, supplying conference and National website information, liaising with local media.
- Manage conference website (not hands on, just the look and feel and content)
- Obtaining past and potential delegate lists to create a potential delegate master list
- Create template for all external communications
- Decide on format for Conference handbook the Event Management Company re all publications
- Write appropriate communications, E.G., first conference notice, letter to potential sponsors, conference updates etc
- If required work with PR agencies

### Resource timing:

Busy at the start finalising website content and templates then low level but regular workload

**D) Social/Local Arrangements:**

Primary Tasks:

- Oversee and coordinate the various activities of the Social/ Local Arrangements Committee and to report activities to Conference Chair
- Finalising venues and entertainment for all social events
- Working on any pre/post events if required.

Resource timing:

Relatively low level, with site inspections, menu and entertainment choices. Will be ongoing.

**E) Finance:**

Primary Tasks:

- Working with the Event Management Company managing budgets and cash flow in compliance with CATE National Policies & Procedures.

Resource timing:

- Low level but ongoing. Meetings on a bi-monthly basis with the Event management Company.
- Email correspondence re payment authorisations between Finance Chair and Event Management Company

### 3) CONFERENCE TIMELINE

#### A. *June previous year*

- Expressions of Interest are filled out June wk. 1
- EOL sent to CATE National Executive for their consideration June wk 2
- Event Management Company reviews EOL's and determines best fit wk 3 and 4
- Region notified of success or otherwise end of wk 4
- Date and venue confirmed.

#### B. *July previous year*

- Committee meet to discuss and explore Keynote presenters
- Names and contacts to Event Management Company to make contact and invite to speak.
- Confirmation to Regional Hosts and National Executive of speakers and costings.
- *CATE Procedures Handbook* 13.1: approve any major financial expenditure outside of venue and catering

#### C. *August/September/October previous year*

- Liaise with National President (*CATE Procedures Handbook* 13.1 &13.2)
- Sponsors are not to be approached until after current conference to ensure focus and direction is not taken away from that conference.
- Prepare your regional presentation for Location announcement on last day of conference.

#### D. *Previous year*

- Deliver presentation at Conference
- Start to develop Conference theme and strands building on previous conference and in line with guidelines and Statement of Intent

#### E. *December previous year*

- Send information to website developer for creating your conference website.
- This is to be live by the end of March of the year of your conference.
- The website will use the same template for outlines but will allow for regional flavour and content.

#### F. *April same year*

- Conference website live, including accommodation options
- Registrations live by end of month
- Draft programme live by end of month

#### G. *June same year*

- Call for abstracts

#### H. *July same year*

- Early Bird registrations close 31<sup>st</sup>
- Abstract submissions close 31<sup>st</sup>

#### I. *August same year*

- Workshop selection live

#### 4) **OPERATIONS AND LOGISTICS**

***See also CATE Procedures Handbook, Clause 13.4***

- Operations and Logistics are primarily managed by the Event management Company.
- They will work closely with the Conference Chairman to ensure:
  - that the objectives set out within are met and adhered to and
  - clarity of responsibility for tasks requiring local input
- The Conference Committee will manage its responsibilities within an appropriate time frame to ensure deadlines are met.
- The Event Management Company will set up and manage an online abstract process.
- The Event management Company will facilitate access for the programme committee to moderate abstracts.
- The Event Management Company will contact the selected presenters and workshop hosts to finalise timings for the programme committee.
- The Event Management Company will create and manage a full online registration process and provide updates to the Conference Chairman with delegate numbers.



## 5) FINANCES AND REPORTING

The Event Management Company will pay and confirm venue/catering/accommodation bookings and deposits. This money to be reimbursed after sponsorship money is received.

The CATE Constitution makes provision for underwriting of a conference should this be required, up to the value of \$50,000

The CATE Procedures Handbook includes guidelines for the annual conference on the National Executive's responsibilities for:

- providing advice and guidance on funding, legal and tax issues as and if required.
- the need for consultation over cost structures
- gaining approval from the National Executive for any major financial expenditure outside of Venue and catering

*(cf Clause 13.1 CATE Procedures Handbook)*

The Event Management Company to meet reporting deadlines:

- Prepare a financial report in time for the Conference Convenor to present at the first National Executive meeting following Conference.
- Initial transfer of funds to CATE to meet the same deadline.
- Provide a complete set of accounts for the Conference Chairman to present to the National Executive at the earliest opportunity.

*(cf Clause 13.4 CATE Procedures Handbook 13.4)*

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**Abstract Submission Form**

*Please complete all fields below before submitting.*

<b>Name</b>	
<b>Organisation</b>	
<b>Postal Address</b>	
<b>Email Address</b>	
<b>Contact Number</b>	
<b>50 word bio</b>	

<b>Title of Abstract</b>	
<b>Theme</b> <b>(Please select)</b>	<ol style="list-style-type: none"> <li>1. Sustainability in a Changing World</li> <li>2. Innovation in Career Practice</li> <li>3. Thinking towards the Future</li> <li>4. Working with Diversity</li> </ol>
<b>Abstract Summary (300 words max.)</b>	