

GUIDELINES FOR BSHI CONFERENCE MEETING ORGANISATION



Here are a few pointers towards organising the annual conference meeting. Many points are based on experience of previous organisers and will be up-dated as successive meetings are held.

It is most important to remember that the **BSHI Annual Conference is a business venture** and should be treated as such. The BSHI annual conference must break even financially. If any profits are made, these will contribute to the running costs of the Society.

ROLE OF MEETINGS SECRETARY:

- To act as an advisor and facilitator to the local organising committee.
- To visit the proposed conference site (along with the trade liaison rep) and approve the venue.
- To act as point of contact between local organisers and the Main BSHI committee.
- To be in regular contact with organisers and offer support where necessary.
- To gather information from past meetings (delegate numbers, trade and sponsorship details, scientific programme details) and collate information for future organisers.
- To archive the conference delegate attendance registers for a minimum of 5 years in accordance with CPD criteria.
- To review the delegate feedback questionnaires from each conference and feedback to the main committee.
- To update the Meetings guidelines where necessary.
- To apply to the Royal College of Pathologists for advance CPD approval every 3 years so that all BSHI educational meetings, including the conference, are CPD accredited.
- To organise a suitable award (e.g. an engraved presentation plaque) to be presented to the BSHI president at the end of their 4 year term.
- To produce the certificate for the Hilliard Festenstein speaker each year using the approved template.

ROLE OF CONFERENCE 21

BSHI have now appointed a commercial events management company, Conference 21, to support the local organising committee in arranging the annual conference. Below is a list of services they will provide. Conference 21 will support all aspects of organising the conference apart from arranging the scientific programme. The conference services manager and contact details are:

Jill Hitchener,
Sheffield Hallam University
City Campus, Howard Street
Sheffield S1 1WB
Direct line +44 (0)114 225 5319/5340

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Quote for the British Society for Histocompatibility and Immunogenetics (BSHI) Annual Conference

Tasks

- Preparation of draft budget
- Set up and monitoring of financial account
- Reservation of venues, catering, accommodation, a-v etc
- Design of visual identity for the event
- Preparation of conference literature, i.e. programme and booking form and Conference handbook (printing costs extra in accordance with requirements)
- Organisation of advertising, publicity and press releases (advertising charges from publications charged as extra)
- Mailshots and postage
- Attendance at Organising Committee meetings by one member of Conference 21 staff
- Receipt and acknowledgement of applications and fees
- Invoicing, paying in cheques, issuing financial receipts
- Set up and maintenance of attendance database
- Liaison with Delegates, Speakers, Sponsors, Exhibitors, VIPs and guests
- Organisation of commercial exhibition as part of event
- Social programme arrangements
- Booking of entertainment and after dinner speakers
- Signage – external and internal at event venue
- Special needs arrangements, e.g. disabled access, signing for hearing impaired
- Organisation of transport for social programme and visits
- Volunteer and helper arrangements and briefing
- Sourcing and preparation of delegate packs and badges
- Registration of delegates at the conference
- General administration in lead up to the event
- Conference Office and administrative support during the event
- Preparation of final conference account
- Collation of feedback from participants

ROLE OF LOCAL ORGANISING COMMITTEE:

- To contact Conference 21 as soon as the proposal to organise the conference has been accepted by the main BSHI committee.
- To make all local arrangements with the assistance of Conference 21.
- To arrange academic programme; this is mainly now undertaken by the RE and BEB who must ratify the final programme.
- To liaise with Meetings Secretary.
- To liaise with BSHI Treasurer, with particular regard to budgeting the event and to profit margins.

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- To submit a proposed budget for the conference to the main BSHI Committee via the Meetings Secretary. **This must be done for the December meeting prior to the conference.**
- To attend the April and July main BSHI committee meetings prior to the conference and feedback on local organisers progress.
- If desired to seek advice from the BSHI committee on matters pertaining to the organisation of the conference, the usual point of contact with the committee is through the Meetings Secretary.
- To report back to the Meetings Secretary after the conference has taken place, providing delegate numbers, trade and sponsorship details, delegate attendance register (for CPD), delegate feedback questionnaires and any other information useful to the planning of future conferences.

COSTINGS

- Do not overspend. Gauge the approximate amount of money you are likely to have.
- Be realistic in your estimation of the number of delegates that will attend, aim to budget for 100.
- In addition, monies should be obtained through sponsorship from Trade and other local companies. **Any sponsorship must be advertised in the conference handbook.**
- It is strongly recommended that a **20% loading** is added as a contingency against unforeseen additional costs.
- Remember, any initial seed money borrowed must be included in the costing.

CONFERENCE ACCOUNTS

- All finances must go through the BSHI Treasurer.
- A Local Treasurer should be appointed to keep accounts of all transactions conducted during the organisation of the conference with the assistance of Conference 21 – use the 'Conference Budget Planning Spreadsheet' which has been specifically designed for this purpose by the BSHI Treasurer.
- Requests for all monies are to be addressed to the BSHI Treasurer. Receipts are needed for any payments to be made.
- Petty cash expenses are to be claimed from BSHI on submission of receipts.
- Conference accounts are ultimately documented in the BSHI annual accounts.
- Keep all bills and receipts and copies of all letters written.
- After the conference the BSHI Treasurer may request a meeting with the local organising committee to audit the accounts. An independent representative from the BSHI committee may also be present.
- A list of all commercial companies who have taken trade stands or donated sponsorship must be passed to the Meetings Secretary so the database can be updated for use by future organisers. A list of companies approached but who

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declined from sponsoring any events should also be given to the Meetings Secretary.

ACCOMMODATION

- This is a matter of choice and may be determined by the local organising committee. Considerations to think about include the following:
 - Halls of residence - generally cheapest option.
 - Hotel with conference facilities - better standard of accommodation.
 - Conference centre - may need to find separate accommodation.
- There **must be a minimum standard** of accommodation however which includes;
 - Good clean rooms with en-suite facilities
 - tea/coffee making facilities in each room
 - short walking distance from breakfast catering facilities
- If the accommodation is over 10 minutes walk away from the conference venue, transport must be provided.
- If possible keep all delegates, including the trade, together as this tends to encourage an atmosphere of good communication, networking, etc.
- If halls of residence are the accommodation chosen some commercial companies may want to stay in hotels close to the university & not in halls. Invited guest speakers might also be offered hotel accommodation.
- Hold a sensible number of rooms for potential delegates. The active membership is ~350 and approximately 100 - 150 delegates usually attend the conference (including trade representatives). You can request details of delegate numbers for past BSHI conferences from the Meetings Secretary.

LECTURERS

- Consult with the BSHI Education Board (BEB)/ RE regarding suitable topic selection. Include education sessions to cater for & attract trainees. Ask the Meetings Secretary for details of past BSHI programmes including the Hilliard Festenstein and Terasaki lectures.
- A scientific committee will be needed to discuss subjects and speakers with the RE and the BEB must ratify the final programme.
- **Always invite the Honorary President of BSHI to attend the conference free of charge.** If they attend, they should also be invited to present the prizes at the Gala dinner. You should invite them to give a Presidential Address the year the President's 4 year term ceases and at the end of their address, an award will be presented to them by the BSHI chair so allow time in the schedule for this (the award is organised by the Meetings Secretary).
- Invite speakers well in advance especially if they are very well known and are likely to be invited to speak at a number of meetings.
- Request permission to put their slides on the BSHI website in the initial letter.

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- Advise them what IT/ presentation facilities will be available and the length of time they have. Request they e-mail their presentations before the conference so they can be organised by the local IT team and everything is then ready to go on the day.
- Request an abstract from the keynote speakers to go in the conference handbook.
- Put a notice in the conference handbook that the presentations are the property of the presenters.
- **Arrange a budget for speaker expenses.** Inform speakers, after initial approaches, as to how many nights accommodation they will receive and where, whether they are eligible for flights and train fares and in which class - usually economy (unless sufficient funding is available for business class).

The guidelines are as follows;

Plenary speakers - Full registration for the whole meeting (with accommodation)
plus:

UK speakers - Standard class rail fare / mileage / low cost airline

European speakers - Economy class flight + transfers

USA & Rest of world- Economy class flight, transfers + up to 2 nights extra accommodation.

Free day registration for teaching sessions etc. if an individual is making a major contribution e.g. a request for someone to completely organise and chair a teaching session.

Expenses are not paid for to Abstract session /"Young Scientist" session speakers, or for chairpersons.

- Hilliard Festenstein lecture: appointment is the responsibility of the local organising team & the Research Executive. The certificate for this is generated by the Meetings Secretary so ensure the speaker details are forwarded to them in plenty of time. The certificate is to be awarded to the speaker by the chairperson directly after they have given their presentation.
- Terasaki Lecture – Since 2006 VH Bio have sponsored an international speaker to attend each BSHI AGM. The theme of the talk should be broadly 'Solid Organ Transplantation' and selection of speaker and topic is the responsibility of the local organising team & the Research Executive. Duration of lecture should equal that of Hilliard Festenstein lecture. Liaise with VH Bio to arrange payment of speaker's air fare & expenses (maximum limit £3000). The Terasaki certificate will be generated by VH Bio and should be awarded to the speaker by the chairperson, directly after the lecture.
- If using university accommodation it may not be suitable for speakers. Offer them hotel accommodation as an alternative.
- If using university facilities ask their conference department if they have a deal with a local hotel offering reduced rates if booked through the university.

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- Write to confirm final details with speakers. Include maps, details of accommodation booked and time of lecture.
- **Arrange to have a stand-by lecture & lecturer in case of last minute cancellations.**

CPD APPROVAL FOR CONFERENCE

- Advanced CPD approval is applied for every 3 years from the Royal College of Pathologists (done by the Meetings Secretary) so that all BSHI educational meetings are CPD accredited.
- Certain criteria for the approval of CPD activities apply:
 1. CPD points are allocated at the rate of 1 point per hour of educational time and must exclude any refreshment breaks etc.
 2. Participants can only claim point for the number of hours that they attend.
 3. Certificates of attendance must be provided to participants
 4. Educational events must be evaluated
 5. A written register of attendance must be kept for a minimum of 5 years

In order to comply with these criteria:

- Design and print an attendance certificate for each day of the conference, stating how many hours of scientific activity delegates can claim CPD points for.
- Provide a register for delegates to sign each day they attend the conference. Place the attendance certificates next to it for delegates to collect.
- Design a delegate feedback questionnaire to assess meeting content, structure, format, organisation, venue and each of the speakers (not abstract or young scientist). Place a copy of the questionnaire in each delegate pack and leave a box at the conference reception desk for delegates to leave their completed forms.
- After the conference, forward the completed forms to the Meetings Secretary who will review the comments and forward feedback to the main committee. Also forward the delegate registers to the Meetings Secretary as these need to be kept for 5 years.

JUDGES & CHAIRPERSONS

- Judges need to be organised for the selection of the Best Poster, Best Abstract (orally presented) and the Invitrogen Young scientist awards (remember to invite someone from Invitrogen to judge the young scientist presentations).
- Chairpersons need to be organised for each session in the programme including the Terasaki & HF lectures.
- Advise Chairpersons that they are responsible for keeping speakers to time.

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SPONSORSHIP

- Sponsorship can be obtained from many sources, most commonly commercial companies who are BSHI corporate members or from a small hard-core of companies who contribute to each conference.
- Raising sponsorship is the most time-consuming task of conference organisation.
- Approach every commercial company you can think of. Do this in plenty of time before the conference. A letter is usually the first approach. New potential sponsors need an introduction letter with information about the society, a few details about the conference, the subject matter, speakers, venue etc. This same approach may also be used for selling trade stand space (see below; trade liaison)
- Many commercial companies will set their budgets for sponsoring meetings and will often allot money at the beginning of their financial year i.e. January or April. **Make initial approaches before this time.**
- It is essential to follow up and chase potential sponsors.
- Organisers should highlight the benefits of sponsorship to commercial companies. These include:
 - Listing on the conference website plus a hyperlink to the commercial company for the year they are sponsoring the conference
 - Recognition of all sponsorship given by a company – to go in the conference handbook.

Companies sponsoring events can discuss with the local organising committee how to promote their products during the conference

- Sponsors prefer to sponsor events during the conference to which they can put their name. Break the conference down into sponsorship-manageable portions. e.g. lecture sessions or lecture theatres, a particular speaker, disco/ entertainment, evening meals, drinks reception, transport etc.
- Trade companies may wish to sponsor lunchtime sessions so ensure rooms are available.
- The conference bags require sponsorship and they are an ideal way for a company to advertise.
- A list of companies who have previously sponsored the conference is available from the Meetings Secretary.
- Approach local companies for sponsorship in addition to the regular contributors to BSHI and companies from the sponsorship list.

CONFERENCE LOGO

- Each year there is a conference logo designed by the local organisers, representative of the area/venue.

BSHI CONFERENCE MUGS

- Each year these are very kindly provided by VH Bio. Liaise with VH Bio in good time to ensure the logo for the conference is on the mugs.

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TRADE LIAISON

- Invite a representative from the BSHI Corporate Members to join the local organising committee for advice on Trade requirements and layout of exhibition. An inspection of the venue by the Meetings Secretary and the Corporate representative should be made at the earliest opportunity to approve the proposed venue.
- Contact the Corporate members before the conference to enquire if they want to meet with the main BSHI committee during the conference. If they do, ensure a room is available for this.

TRADE EXHIBITION

- The cost of a trade stand is ~£850, although this should be discussed with the BSHI Treasurer.
- A deposit is required in advance to secure the stand and payment should be received before the start of the conference. This payment covers the cost of a contribution to the food and drink for the Trade Wine & Cheese Event, plus day attendance for two trade delegates i.e. includes refreshment breaks and lunch, **but not accommodation, dinner or social events** (except Trade Wine & Cheese Event). Additional trade representatives should register as delegates.
- Set up a registration form specifically for trade stand representatives wishing to attend the social programme and book accommodation provided - take into account individual costs of accommodation, dinner, transport and entertainment. If applicable the choice of student accommodation or hotel should be offered.
- State the size of the allotted area for each stand. This should be no less than 2m x 3m and a suitable table, plus two chairs must be provided for this area. **Check electrical supplies are sufficient for at least two power points per stand and locate stands so there is access to the power!**

TRADE SHOW CHEESE AND WINE RECEPTION

- This is very important and is a MUST have. BSHI annual conferences are very dependent on support from commercial companies and the wine and cheese evening is the ideal way to encourage delegates to visit trade stands. If possible, try to timetable at least 1hour 30minutes for the cheese and wine reception but also allow time for delegates to return to their rooms and change before dinner.
- In addition to the cheese and wine evening it is imperative to remind delegates to visit trade stands throughout the conference. Exhibitors who feel they have not attracted sufficient attention will not be willing to hire stands in future years. If possible, arrange for lunch on at least one of the days to be served in the trade area to increase delegate/trade mingling.

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BSHI NOTICEBOARD

- This must be in place at every conference so that a list of new members and all other relevant BSHI notices can be advertised.

DELEGATE REGISTRATION

NB. Persons honoured with life membership for services to the society receive free registration (including the dinner) for the conference at which the award is made (subsequent meetings incur the standard member's rate). Also Honorary Members will get one nights accommodation paid for, but travel will have to be paid by the member receiving the honorary membership.

- Design a registration form taking into account:
 - Early registration fee
 - Late registration fee
 - Non member registration fee
 - Disabled access required
 - Dietary requirements
- Some meetings also elect to have a day delegate rate which may or may not include evening entertainment or to have single day rates based on a 24 hr period i.e. to include a night's accommodation.
- **Implement late registration fees.** Many delegates will phone on the last day of early registration to say they will be attending but the money is not available (or similar reason). This may be true; however, these delegates are technically late registrants and as such must pay the appropriate fee. This may seem a trivial matter but the money can amount to a considerable sum.
- **Check delegates who register as BSHI members are current paid-up members of the society.** This should be done by supplying delegate names to the Membership secretary who will check names against the BSHI membership database.
- Local Meeting Committee members with a major contribution to the organisation of the conference are entitled to free registration and accommodation at their meeting.

WEBSITE

- C21 have previously designed and set up a Conference website showing details of programme, accommodation, abstract submission, registration etc
- Always ensure that logos of Trade and Sponsors appear on the website with thanks for their contribution. The logo should also provide a direct link to their company homepage.

TIMETABLE

- Set 30minutes for refreshment breaks and one hour for lunch – both should allow for interaction with Trade exhibition.

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- It is important that sufficient time is allocated for the AGM. This **MUST** be at least 1 hour **when no other event is happening**.
- The Trade Cheese and Wine event needs to be allocated 1½ - 2 hours.
- Both the Terasaki and HF speakers should be allocated 1 hour each (including questions).
- The Invitrogen Young Scientist slot should be 1½ hours (15mins for each of the six top scoring abstracts from BSHI members under 35 years who have elected to have their abstracts considered for this award).
- The Best BSHI Abstracts: oral presentations slot is usually 1½ hours long, allowing 10mins each for the top 9 selected abstracts (including questions).
- A slot for other selected oral presentations of BSHI abstracts should also be timetabled.
- Do not allow sessions to overrun

RE LUNCHTIME MEETING

- The RE usually has a lunchtime meeting at the conference.
- Liaise with the RE secretary and ensure a room is available for this.

PRE-CONFERENCE BSHI COMMITTEE MEETING

- This takes place the night before or on the morning the conference begins
- A room will need to be allocated for this to take place
- Remember to have accommodation available the night before for all members attending this meeting

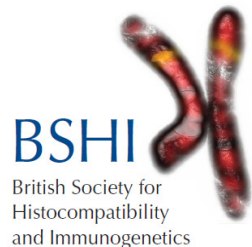
ADVERTISING

- Ensure that the conference is advertised as widely as possible and in good time.
- Place poster at BSHI conference held the year before yours.
- Send posters with delegates to ASHI and EFI.
- Place adverts on meetings page of BSHI newsletter, relevant journals and websites.

ABSTRACTS AND POSTERS

- The RE Secretary places the call for abstracts through for example the BSHI newsletter, BSHI website and local website (if the latter is up and running).
- **ENSURE the deadline for abstract submission is early enough to allow for the abstracts to be assessed by the RE and for the abstracts to be published in the IJI in time for the conference.**
- Check ALL abstract authors are actually BSHI members. Non-members should not be eligible for prizes. This is done by supplying a list of authors to the RE secretary who will check names against the Membership database.

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- Abstracts are often submitted for **either** oral presentation **or** as a poster. Remember that any abstract chosen for oral presentation will not need a poster board.
- Delegates often want to know the maximum dimensions allowed for posters. It is essential to enclose this information in the letter advising of selection of a poster.
- The position of poster boards is important. Best locations are often in coffee areas or where lunch is being served as this encourages delegates to read the posters.
- The RE Secretary will notify the local organising committee of the number of posters and abstracts accepted for the conference.
- The number of posters displayed is usually around fifty. Some conference facilities will be able to provide poster boards, but many will not have a sufficient number of boards to accommodate this number of posters. Hiring poster boards is therefore the only option. Check boards are double sided as this reduces the number required. Hire charges are surprisingly high, so it is advisable to obtain quotations early on in the organisation of the conference so the cost is known in advance and can be budgeted for.

PRIZES

- Prizes & certificates (to be paid for from the conference budget) awarded are;
 - Best oral presentation (from abstracts) - £100 Book token
 - Best Poster - £50 Book token
 - CPD-Journal Based Learning; Most consistent participant and Highest Scorer; from 2013 these individuals will be acknowledged, but will not receive a prize.

Prizes are to be awarded by the BSHI Honorary President (if attending, otherwise the BSHI Chairperson may be asked) at the Gala dinner.

LIFE TECHNOLOGIES YOUNG SCIENTIST AWARD

Life Technologies kindly sponsor this award and will provide the prize and certificate. The contact is David Wareing (email: David.Wareing@lifetech.com). Usually, someone from Life Technologies will help to judge the presentations and present the prize at the gala dinner.

AUDIO/ VISUAL

- Ensure there is a separate room where speakers can load presentations and where they can run through their talks - most conference venues usually provide this, but it is advisable to confirm it.
- If possible, request speakers e-mail their presentations before the conference so the local IT team can have them ready on the day.
- Appoint someone beforehand to assist speakers. This person should be familiar with the equipment. It is also useful to appoint someone to help with roving microphones.
- Provide laser pointers.

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- Do not forget to have extra microphones for audience questions. These can be static; however, it is preferable to have roving microphones and volunteers to man them.

PRINTING THE CONFERENCE HANDBOOK/PROGRAMME

- C21 should assist with this
- Printing of the programme takes place once ALL speakers and lecture titles and timings are known.
- Ask plenary speakers for a précis of their talk, roughly one paragraph, which can be inserted into the programme.
- Put a notice in the handbook to say that presentations are the property of the speakers.
- The programme should list names of the BSHI Honorary President, Committee members and members of the Education Board: **ensure the lists are current.**
- Names of all the Trade Exhibitors and sponsors must be included, with thanks.
- Acknowledgements should be made to reviewers of abstracts, judges, Trade Representative Liaison (if appointed), local organisers and scientific committee. List all of the above by name. Special thanks should be made as appropriate, and to all volunteers.
- BSHI conference programmes are a golden opportunity for advertising and therefore revenue.

JOURNALS

- Blackwell generously provides a number of journals for the conference. If possible, these are best included in the conference packs rather than allowing people to help themselves. This ensures everybody is allocated a journal & you won't run out.

FINALLY

- After the conference, forward the following information and paperwork to the Meetings Secretary:
 1. Delegate numbers
 2. Trade exhibition and sponsorship details
 3. Delegate attendance register
 4. Delegate feedback questionnaires
- Any new or updated Trade company contact details