Following this guide from the very start of your event planning will help ensure it is appropriately resourced and professionally managed and will help to minimise any unexpected surprises along the way. In addition to following this guide, you are advised to use the University of Oxford’s [event management webpage and toolkit](https://communications.admin.ox.ac.uk/event-management#/), which includes important information about risk assessment, health and safety, security, data protection and evaluation.

1. Identify the audience for your event and reason they will attend. Assess the target audience size.
2. Decide how your event will be funded – e.g.through funds associated with your research, or will attendees pay?
3. Identify who will support your event from the administration team. In the first instance this should be the PA associated with your research group.
4. Create a budget for your event, outlining all the expected costs and forecasted income. See Z:\DPHPC\_slideshows\Department EVENTS for a template.
5. Contact the finance team to agree a cost centre for the event [finance@phc.ox.ac.uk](mailto:finance@phc.ox.ac.uk)
6. Work with your PA or your other group admin support to identify a suitable date and venue, ensuring the event does not clash with departmental events or other external events your target audience are likely to attend.
   1. Some Colleges offer VAT discounts for educational events, if delegates are paying for attendance you may be able to secure a VAT discount. Discuss this with the finance team and your venue.
   2. Consider whether anyone in your organising team is a College Fellow, they may be able to secure the booking at a discounted rate.
   3. Consider in advance the type of space you are looking for and how you will use it. This will help you ensure the rooms you need are suitable for the activities you have in mind (e.g. do you need breakout rooms as well as a lecture theatre?) Discuss these possibilities in advance with your venue, as they are unlikely to make last-minute changes to your booking.
   4. Ask the venue about their catering deadlines to ensure you book all your delegates in time and collect the right information about dietary requirements.
   5. Ask the venue about step-free access and hearing loops in advance of securing the booking. A clear map of the step-free access at your venue should be sent to delegates. Include a question about access requirements and read through the responses as delegates sign-up so you can anticipate their needs and liaise with the conference venue.
   6. For venue (and other supplier) bookings outside of the department, ensure you request a contract from them and forward this to the NDPCHS Finance team for review and approval. Depending on the value, alternative quotes or a Single Quote Justification form may be required. Once all documentation is in a place a purchase order number can be raised and provided to the supplier.
7. PAs or group admins should set-up an event listing on the [events section of the departmental website](https://www.phc.ox.ac.uk/events). If you do not already have access to this section, contact [communications@phc.ox.ac.uk](mailto:communications@phc.ox.ac.uk) to get access. All events must be listed on the department website. Only in exceptional circumstances will external websites be permitted, and these must be designed in line with University of Oxford brand guidelines. PAs or group admin supports should add events they are organising to [Oxford Talks](https://talks.ox.ac.uk/) which is used to automatically populate the divisional website and create a weekly and termly events digest. The digest goes to all graduate and undergraduate students and is opt-in for staff.
8. Please also email the full details of the event to the NDPCHS Comms team for promotion in the Weekly Update via: news@phc.ox.ac.uk.
9. Please refer to the [University event management guidance](https://communications.admin.ox.ac.uk/event-management#/) for details of event registration and payment platforms.
10. If delegates are paying – set up a page on the University of Oxford online stores. The Finance team will provide appropriate coding for the event and VAT advice. If you identify that delegates are likely to pay by invoice, discuss this first with the finance team to ensure they have the capacity to process these payments.
11. If delegates are not paying but still need to register to attend – [set-up an online registration page](https://communications.admin.ox.ac.uk/event-management-toolkit-online-registration-platforms#collapse2021261) on MS Forms, CVENT or Eventbrite (although charges apply over a certain number).
12. Are you issuing a call for abstracts and managing submissions? Only use a University email account to manage abstract submissions (if managing by email). Gmail or other third-party accounts are not permitted. If you are not managing by email, or you expect a large number of abstracts, consider using an online abstract management system, such as Oxford Abstracts. The cost of this will need to be included in your initial budget.
13. Consider different avenues for promoting your event to reach your target audience. While social media may seem like a useful platform, rather than setting up your own social media accounts for the event (which can take time to attract followers), consider using existing accounts such as @OxPrimaryCare, @CEBMOxford and @OxfordMedSci
14. Ensure all promotional materials and printed literature given out at your event are branded in line with [NDPCHS brand guidelines](https://www.phc.ox.ac.uk/intranet/communications-engagement/comms/brandguidelines).
15. Each team should order their own conference items (ie lanyards, badge holders, table cloths) in good time for any large conferences they are organising. The Comms team have some departmental pop-up banners but these may be in use.
16. It is advisable not to use students to manage your registration desk, as conferences should be a networking and learning opportunity for students.