Exit Report - Template

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| Name | Tony Kess |
| Contact email: | tonykess@gmail.com |
| Task/Role | Conference Services Liason/Co-Treasurer/Budgeting |

Just leave a section blank if you don’t feel the question applies to your task.

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| Describe your role/task: |

I was the second signatory on the TD bank account we opened, and handled the conference services account contract and the Paypal account.   
Handling the CS account meant booking conference spaces (venues for plenary addresses, poster sessions, talks), AV equipment, and poster boards, as well as dealing with the food and drink contracts and housing for the event. Most of this was handled through University of Guelph conference services, and so I attended roughly biweekly meetings with conference services to update our requests.   
For the Paypal account, I opened a business account and synced it with our TD account, and transferred registration fees from the website to our bank account, as well as reimbursed cancelled registration.

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| What did you wish you had known beforehand? | List important info or decisions you may have to know in order to complete your task/role. For example, you can’t start fundraising until you have a budget. |

Conference service at Guelph dealt with the food, as well as room booking and equipment booking, but it’s worth talking directly with the departments in buildings that are booked for the conference for equipment (AV) and poster boards, and ensuring access to rooms that are ostensibly “booked” by conference services.   
Secure AV equipment including computers early, and ensure they’re compatible with one another.  
Triple-check all contract information and schedules with conference services before the event to ensure you’re both working off the same schedule. Our contract had incorrect information on it up until a week before the conference got underway.

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| Contacts | List the organization/companies/individuals you contacted to complete your task. Would you contact those individuals again? If not, why and do you have suggestions for may have been a better choice? |

-We banked with TD Canada Trust , and used Paypal to handle our registration fees, except those transferred within the university.

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| What worked? | List the things that made your task easier, or resulted in it being a success. |

- Sara and I managed the budget together, and split duties for handling the bank account (Sara), and Paypal account (Tony).

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| What didn’t work? | List the things that you would change or do differently to save yourself time/energy/$ if you had to do the task again. |

-Overall, I think things ran very smoothly for us. I can’t think of any suggestions that would have drastically improved how things ran in terms of money.

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| Give a general timeline to completing the task. | Give general dates for around when milestones on your task were completed. You can make suggestions about if you thought you did this too late/too early. |

- Fundraise EARLY/immediately. This was makes life way less stressful for the entire committee, and it gives you an idea of where funds are going in terms of budgeting for paying conference services bulls.

-We let all of our registration money build up in our paypal account (our registration payment was online) and then transferred it over all at once after the conference had ended. This also worked very well for us, so that is something that you could repeat.

-When you choose your Treasurer(s), keep this in mind: the Chair(s) and Treasurer(s) have responsibilities long after the rest of the committee. Bills come in for things you used during the conference after it has ended and it takes some time to get everything lined out. If someone is planning on leaving for the summer, it would be wise to not place them in the Treasurer position.

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| Do you have any online accounts or account information to pass along? | Give id and passwords for account you may have used and the next group could take over (Facebook, Twitter, etc.). |

-There will be a seed fund for the 2014/2015 OE3C committee at York.

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| Future Goals | If you could do this task over again, what do you think are reasonable goals that would be achievable? |

-If I did everything over again, I would avoid having people handling the budget, bank accounts and conference services handling any secondary tasks. I didn’t end up promoting very much on social media, but conference turnout was good regardless.

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| Other comments | List any other useful information that the previous questions may not have answered. |