

Request for Service Quote CALs Conference Services

We wish to provide you with the best possible event management services. This document is to give us an idea of your service needs. You will receive a service quote to use for planning purposes. We realize that your needs may change. A more detailed service planning meeting will take place upon acceptance of our high quality professional event management services.

Coordinator(s): _____ Email: _____

Department: _____ Inter-D Address: _____

Phone: _____ Fax: _____

Name of Event: _____

Dates of event: _____ Expected number of attendees: _____

Location: _____ Approximate registration fee: _____

My event is best described as: ☐ Conference ☐ Reception ☐ Banquet
☐ Short Course ☐ Continuing Education ☐ Other (describe)

We anticipate need of the following services (check all that apply): _____

EVENT PLANNING

- ☐ Consulting
- ☐ Design of event including timeline
- ☐ Attendance at committee meetings

REGISTRATION SERVICES

- ☐ Registration management
- ☐ Set-up registration database
- ☐ Accept registrations via mail or fax
- ☐ Accept web registrations
- ☐ Mail confirmation receipts
- ☐ Collect fees and manage all account receivables
- ☐ Make name badges
- ☐ Provide check-in roster, walk-in forms, receipts
- ☐ Create certificates
- ☐ Provide registration income report

ON-SITE REGISTRATION SERVICES

- ☐ On-site coordination (estimate number of days and time) _____

FACILITY MANAGEMENT

- ☐ Evaluation of potential sites
- ☐ Contract with facility for meeting space
- ☐ Contract sleeping room blocks
- ☐ Make catering arrangements
- ☐ Configure meeting space
- ☐ Make all audio-visual arrangements

FINANCIAL MANAGEMENT

- ☐ Develop preliminary budget for event
- ☐ Manage all income
- ☐ Manage and pay all event related expenses
- ☐ Provide accounting report at conclusion of event

PROMOTION AND MARKETING SERVICES

- ☐ Design brochure
- ☐ Coordinate printing of brochure
- ☐ Coordinate mailing of brochure
- ☐ Place paid advertisement in publications
- ☐ Draft press releases
- ☐ Host and design web page
- ☐ Purchase conference gift

MATERIAL HANDLING SERVICES

- ☐ Design and produce abstracts or proceedings books
- ☐ Reproduce speaker handouts
- ☐ Design Evaluation Forms
- ☐ Printing of color handouts or other special services
- ☐ Assemble course handouts, folders, binders, etc.

SPEAKERS

- ☐ Contact speakers
- ☐ Confirm for audio-visual, biographies, and handouts
- ☐ Make accommodations
- ☐ Make travel arrangements
- ☐ Process reimbursements or honorariums

TOURS AND ENTERTAINMENT

- ☐ Secure speakers or entertainers
- ☐ Negotiate and contract for service
- ☐ Book tour or field trip
- ☐ Arrange transportation

EXHIBITORS, DISPLAYS OR POSTER SESSIONS

- ☐ Contract space and equipment
- ☐ Develop exhibitor materials
- ☐ Register and confirm
- ☐ Assign space

OTHER _____

FOR OFFICE USE ONLY

Date received: _____ Date responded: _____

Quote given: _____ Initials: _____

Result:

☐ Client accepts service: _____

Date contract sent: _____ Initials: _____

☐ Client declined service: _____

Note reason: _____