

**10th Congress International Ergonomics Association
1 – 5 August 1988 Sydney Australia**



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**FINAL REPORT
OF
THE ORGANISING COMMITTEE
TO
THE IEA COUNCIL
SEPTEMBER 1989**

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* A separate and comprehensive Report is available from the IEA



Host:
The Ergonomics Society
of Australia Inc

Endorsed
Bicentennial Activity



INTRODUCTION

This is the final report on IEA88, the 10th Congress of the International Ergonomics Association which was held in Sydney, Australia during the week of 1-5 August, 1988.

It details important aspects of the planning, organisation, promotion and execution of the Congress which will serve as the official record and which should provide useful information for other organisers of IEA Congresses.

The Report is made up of several parts, one each on the major areas of activity and which accompany this Report written by the Congress Chairman. The accompanying parts elaborate on the information in this Report and are:

1. Report of the Scientific Convener, June 1989.
2. Report of the Congress Treasurer, May 1989.
3. Report of the Convener, Publicity and Promotions, May 1989.

To gain a full understanding of the "organisation" of the Congress it should be read in conjunction with the 1986, 1987 and 1988 Reports to Council; the 1st Announcement, Call for Contributions & Expression of Interest, and Provisional Programme & Registration brochures; and the Final Programme.

The reports to Council show the development of the organisation with discussion of various issues and progress statements including difficulties and proposals. The various brochures show the reality of the organisation at the various stages.

THE VENUE

The venue chosen was the Sheraton-Wentworth hotel in downtown Sydney because it offered all the required attributes for an international conference: central location in a major city; suitable rooms for plenary, oral and poster presentations, business and committee meetings, and press interviews; suitable accommodation (top end of range) and close proximity to social and historical attractions. It proved to be a first class venue in all respects.

THE DATE

The date was chosen to be approximately the same time of the year as previous IEA Congresses, mainly to suit delegates from the northern hemisphere, especially academics, and to fit in with their possible holiday plans.

No one date will suit all people and it was felt the 1-5 August date and Sydney's mild winter would not deter many local (Australian) delegates. The week of Congress turned out to be a superb, sunny and atypically warm time.

AIM & OBJECTIVE

Before embarking on developing the scientific programme, the primary reason for the Congress, it was first necessary to identify the aims and objectives of the Congress and to consider ways in which it could be promoted.

The Aim was *To raise and broaden the profile of ergonomics in Australia and to provide an international forum for the exchange of ideas, knowledge and discussion of state-of-the-art developments in ergonomics.*

The Objective was *To reach as wide an audience as possible and to encourage them to 'buy' ergonomics in principle and practice. To this end it was necessary to develop a theme and target specific groups of people and market the Congress accordingly.*

THE THEME

It had originally been decided that there should not be a specific Congress theme but a number of sub-themes to provide more specific foci, hopefully to make the Congress more obviously relevant for employees to be able to attend. However it was soon realised that to properly promote the Congress it was necessary to have a general theme which was consistent with the stated Aim and Objective of the Congress.

The theme chosen was *Designing a Better World*. It was felt that this theme would have broad appeal and allow for appropriate marketing strategies to be developed. It was found that the theme was necessary and appropriate, and did assist in the promotion of the Congress by providing a unifying perspective for both delegates and the media.

Streams

Because of the formation of the IEA Technical Interest Groups (subcommittees of the Scientific & Technical Committee) it was decided to use them as foci for the Congress and develop related streams for the Scientific Programme. Five streams were chosen on the basis of topicality and relevance to the Australian scene. In doing this it does not inhibit the acceptance of any contribution or development of other streams or sessions. It did enable a clearer perspective to be had as to who were the relevant target groups.

The proposed streams are as set out below with some of the target groups:

- * Consumer Ergonomics - architects, industrial designers, designers, planners, consumer groups etc
- * Manual Handling (Industrial Ergonomics) - engineers, safety officers, risk managers, unions, occ. health & safety professionals, trainers, planners, behavioural scientists
- * Safety and Health - same as for manual handling
- * Computers (and Communications) - manufacturers, computer

scientists, user groups, consultants, researchers etc

- * Organisational Design and Management - system, personnel, human resource, operations, and EDP managers, etc

ATTENDANCE

The official attendance figures for the Congress were:

| | |
|---|-----|
| Full delegates (fee paying) | 433 |
| Complimentary (VIPs, committee, sponsors) | 28 |
| | --- |
| Total full registrations | 461 |
| Students (incl 12 Australian) | 20 |
| Day registrants (incl 58 Australian) | 69 |
| | --- |
| Total other registrations | 89 |
| Accompanying persons | 50 |
| | --- |
| TOTAL ATTENDANCE | 600 |
| | --- |

In all 29 countries were represented. The breakdown of full delegates (incl. complimentaries) by country was:

| | | | |
|---------------|-----|-----------------|-----|
| Australia | 254 | New Zealand | 5 |
| Belgium | 2 | Norway | 1 |
| Canada | 9 | Poland | 2 |
| China | 1 | Singapore | 1 |
| Denmark | 6 | South Africa | 2 |
| Finland | 8 | Sweden | 24 |
| France | 16 | Switzerland | 4 |
| Hungary | 1 | Taiwan | 1 |
| India | 2 | Thailand | 2 |
| Indonesia | 2 | The Netherlands | 8 |
| Italy | 4 | United Kingdom | 19 |
| Japan | 30 | U.S.A. | 37 |
| Korea | 2 | U.S.S.R. | 3 |
| Malaysia | 1 | West Germany | 13 |
| New Caledonia | 1 | | --- |
| | | TOTAL | 461 |

FINANCE

The complete and detailed financial report is given in the accompanying document entitled *Report by Congress Treasurer to I.E.A. Council* dated 20th May, 1989.

The Congress was a financial success with a surplus of income over expenditure of some \$90,000 AUD. This excludes all advances to the Congress which were repaid in full, and the IEA capitation fee of 25 Swiss Francs per (full) delegate (461 of) which was an item of budgeted expenditure and paid accordingly.

The surplus does include 10,000 Swiss Francs which was subsequently given to the IEA to "establish a fund in the name of The Ergonomics Society of Australia for sponsorship of Ergonomics conferences in developing nations with particular emphasis on the South East Asia and South Pacific regions".

The reason for the large surplus is attributable to a number of factors: greater attendance than the budgeted break even figure of 400 full delegates (due to a large extent to the effective marketing of the Congress); greater proportion of "late" to "early" registrations to that on which the registration fee was based; and greater sponsorship than that on which the registration fee was based.

In hindsight, the deadline for early registration (5 months before) was too early but it was to provide the necessary cash flow and at the same time be a real incentive for delegates (to save \$65 or 12%). It did not prove to be an incentive. All IEA Council members were given the early fee (\$485 AUD) despite when they registered.

It must be remembered that the registration fee must be set 12 months ahead and be based on realistic (and conservative) projections of the attendance, sponsorship and budgeted expenditure for goods and services. As it was, it was not obvious till just before the Congress that the break even point had been reached.

SCIENTIFIC PROGRAMME

The scientific programme was as set out in the *Final Programme* and the Scientific Convener's report is given in the accompanying *Report of the Scientific Convener*.

The week long programme was broken up into 5 distinct streams or sub-themes: Design, Manual Handling, Health & Safety, Human-Computer Interaction and, Organisational Design and Management. This was to focus on the technical interest groups (Scientific & Technical subcommittees) of the IEA and to facilitate promotion of the Congress. There was a total of 51 scientific sessions plus the General Assembly of the IEA, and the closing ceremony.

Every morning there was a plenary session (with keynote speaker) devoted to one of the five streams followed by five parallel sessions (3 oral, 1 poster and 1 workshop) before and after lunch. Sessions finished at 4:00 pm to allow for IEA, special interest and business meetings, and to allow delegates a break for social and tourist activities. This worked well and was appreciated by both delegates and groups needing to meet.

The six invited keynote speakers (Corlett, Triggs, Chaffin, Kilbom, Shneiderman and Dray), selected to present the keynote address on the streams, were excellent and very well received.

The scientific programme went extremely well with virtually no hitches due to the excellent organisation by the Scientific Programme committee. The policy of the Congress was that no author could present unless they were registered. This was to ensure that there were no "holes" in the final programme because

authors did not turn up. It did cause some caustic comment from two participants in a workshop, due mainly to a breakdown in communication. Overall it was a very successful policy.

The Scientific Programme committee also attempted to raise the status of posters by giving them equal status in the programme, having poster presenters prepare a formal paper for inclusion in the Proceedings, and there being no indication given in the Proceedings as to which papers were given orally or by poster.

Final Programme

The *Final Programme*, apart from listing the time and place of presentation, gave a page number reference to the associated paper in the Proceedings. It also gave a daily overview of Congress proceedings (incl tours and social events) with a session by session timetable. The pages for each day were colour coded to assist delegates (this colour coding was also used for the name badges of day registrants - indicating the day/s on which they could attend).

Overall organisation of the scientific programme went extremely well with much thought and preparation given to supplying information and guidance to presenters (e.g. instructions for preparing papers & posters, guidelines for preparing 35 mm slides & overhead transparencies, and forms requesting information on the speaker and their audio-visual needs).

The computerisation of presenters' details (paper title, time and place of presentation, registration etc) allowed for efficient and accurate communication with presenters. It appeared to work well.

Proceedings

After a great deal of negotiating and bargaining, a special sponsorship/publication deal was struck with Taylor & Francis. For \$12,000 AUD it was agreed that the congress organisers print sufficient copies of a 2-vol, soft back set of Proceedings for distribution to all IEA88 delegates (and members of the Ergonomics Society of Australia) in return for 300 copies in flat sheet form (to be hard back bound by T&F) for sole, after Congress sale. This worked extremely well and the "official" published Proceedings of IEA88 look excellent - perhaps the second volume in a Taylor & Francis series of IEA Congress Proceedings?

The editors wanted the Proceedings to look like a proper "book" and not parallel the Final Programme. This was to treat all papers alike, irrespective of whether they were presented orally or by poster. Also it was felt necessary to have both an author and subject indexes with page references. The contents was grouped into subject areas with individual entries having a cross reference to the scientific Session in which they were presented.

It was because of this cross referencing between the Final Programme and the Proceedings Contents that it was essential that the final timetabling of presentations was tight, and another reason for having presenters registered (by a given

date) for the Congress. It made the job difficult (with a lot of mail, faxes and phone calls to determine if presenters were in fact going to register) but in the end it enabled a first class programme and publications.

SOCIAL PROGRAMME

The social programme went extremely well with a varied and apparently enjoyable set of activities. The social programme was considered an important and essential complement to the scientific programme, allowing for discussions to be extended into the less formal atmosphere of social events.

Choosing Venues

Exciting and different venues were chosen to match the themes created for each social event. The criteria used were:

1. they would easily accommodate 400 - 600 people.
2. they were attractive, had character and were interesting or had great views.
3. catering of a suitable quality was available.

Catering

Largely determined by the budget developed within the total Congress budget and any special social sponsorship obtained. Provide best quality food and beverage with a reasonable selection. It is important to maintain a high standard in this area as people remember "lousy food".

Receptions

Welcome reception, and Congress dinner are mandatory and included in the registration fee to ensure numbers. A special optional function is very worthwhile.

That Something Special

To try and make the Congress a little special and different, social sponsorship was sought and gained. As a memento, small gifts were purchased for all delegates - a pewter keyring; and all accompanying persons received an "Aussie Fly-swat". These were a great success at a minimal cost for the impact they had.

Special Tips

1. decide where to hold the functions and book early.
2. follow up constantly and pay great attention to detail.
3. think of something special for registrants to take away - metaphorically and physically.
4. seek sponsorship early and offer high quality food and beverage.

5. be available and alert to everything going on at the functions, know when bar budgets have been reached.
6. have fun and plan a 6 month holiday afterwards to recover.

PROMOTION AND PUBLICITY

The earliest promotion for IEA88 was conducted at the 9th IEA Congress in Bournemouth in 1985. A special Australian wine, beer and cheese tasting was arranged as a social function, hosted by the approximately 15 Australian delegates. It was a great success and started the "idea" of visiting Australia in 1988 for the then next IEA Congress. The *1st Announcement* glossy brochure was also distributed to all delegates via the Congress satchel.

10,000 *Call for Contributions and Expression of Interest* brochures were printed and distributed worldwide. Whenever possible "articles" on IEA88 were prepared and distributed to a worldwide network of journals, newsletters etc. This was not always easy or effective as some publications only come out every 3 or 6 months and there is always a *l_o_n_g* lead time necessary.

As stated earlier various streams were chosen to better target potential delegates not necessarily in the main stream of ergonomics.

15,000 copies of the *Provisional Programme & Registration* brochure were printed and most were distributed, in the end in direct mailings to members of associated professional groups in Australia. They were also distributed at the 1987 International Congress on Occupational Health and Safety in Sydney (2000+ people) as well as ergonomics conferences in the UK, USA and Yugoslavia - wherever contact could be established and agreement reached. The 1987 HFS conference in New York provided a major avenue to promote IEA88 to the large north American population.

A special *Ergonomics at Work* flyer (4 faces of an A3 folded to A4 sheet) was produced giving newspaper type "headlines" and a paragraph on selected papers accepted for publication in the Congress Proceedings. This proved to be a very valuable tool to draw media attention to the Congress.

As a result a special press briefing took place on the eve (Sunday) of the Congress. The keynote speakers and other notable speakers were interviewed by the press. One of the available meeting rooms was then used as the press room for the whole of the Congress - there was a considerable amount of press coverage, radio and television interviews as well as newspaper articles etc. Whilst black & white photographs were sought (and used) from the keynote speakers, it is desirable that all authors supply a small black & white photograph for possible use in press stories.

Other details of the "marketing" of IEA88 are given in the accompanying document *Publicity and Promotions*. The whole exercise proved invaluable and was the stimulus for a poster presentation on "Marketing Ergonomics in Australia: the IEA88

Story" at the *Marketing of Ergonomics* conference in Noordwijk, The Netherlands in June 1989. The poster was prepared by the Promotion & Publicity convener.

CONGRESS ADMINISTRATION

The Congress was expertly managed by the professional conference organiser AGENDA represented by the principal Elizabeth Rich and her assistant Tracey Bailey. Apart from the expert knowledge and experience on which they drew to help run the Congress, it was their willingness and dedication to make it a success administratively, financially and socially which allowed the Congress organisers to concentrate on the scientific and policy making aspects of the Congress.

A previously engaged professional conference organiser proved a disaster. This just highlights the difficulty in choosing a good professional conference organiser, despite having put the job out to tender using a set of detailed job specifications (see attachment to 1986 Report to Council).

The use of computerised data base and mail merging facilities proved an invaluable tool in keeping track of speakers' and delegates' records (for example see Appendix 4 of Scientific Convener's Report) and providing efficient and accurate feedback. The following information has been supplied by AGENDA.

Finance

The Congress treasurer was responsible for all banking and issuance of cheques, and kept up-to-date accounts using a spreadsheet on his microcomputer. This is usually the function of a professional conference organiser. AGENDA computerised the receipt of all registrations and checked all accounts for payment. They also obtained quotes, often bargaining the price down to the best for the Congress, and carefully monitored spending. In this respect AGENDA was excellent and achieved a lot for the Congress.

Provisional Programme & Registration

The challenge facing the organisers was to produce a quality registration brochure which would act as a marketing piece to attract registrations, within an extremely tight budget. AGENDA negotiated with an entrepreneurial publisher to produce a 32-page full colour quarto size "booklet" on the Congress. This was in exchange for the right to sell advertising to ergonomics-related commercial suppliers etc.

The committee was aware that this was establishing a precedent and that advertisements would most likely only come from seating manufacturers/suppliers. However it was decided to proceed and the overall result was very pleasing. The publishers printed 15,000 booklets and 5,000 flat A4 envelopes all at no cost. The only, and considerable, expense was the mailing.

The market was saturated with the booklets, particularly in Australia. Bulk supplies were air freighted free-of-charge by

the Congress airline QANTAS. Several thousand were mailed direct to individuals on the various Congress mailing lists. Copies were also inserted in appropriate mailings to various professional bodies, wherever possible at minimum cost.

Registration

Congress registrations were all recorded on a computer database as they were received. AGENDA, using a microcomputer and the Q&A software recorded the following data: date received, cheque and payment details, name, registration and receipt numbers, registration category, preferred name for name-badge, address, country, accompanying person, accommodation requirements, and social and tour activities. Also lecture session preferences were coded to assist room allocation of the scientific sessions.

The self designed database form was satisfactory but there were some limitations on the amount of information per report which could be generated. Registrations were coded as:

- Full - all scientific sessions, full satchel, Welcome reception and Congress dinner
- Day - all scientific sessions on nominated day/s, day satchel including Final Programme and note pad
- Student - registered on a daily basis and treated as same as Day registrant
- On-site - registered at the Congress (paid late fee) and treated as Full delegate
- Complimentary - applied to Congress committee (but who paid all other real costs - social) IEA Executive, keynote speakers and major sponsors

Once the registrations were recorded on the computer, a confirmation letter and computer printout of their database record was sent to the registrant (see Appendix 1). This letter also served as their receipt. The first registration (a Day one) was received on 1 December 1987, with the first Full one being received on 15 December 1987.

Registrations were very slow until late February 1988, then picked up in March, dropped back in April, and were steady in May and June with a late rush in July. The high number in March was a result of the increase in the registration fee (+\$65) after 1 March.

The break-even figure of 400 (Full) delegates was not reached until 26 July, but the financial break-even was attained before this date due to greater number of delegates paying the higher registration fee. This applied to 224 delegates, more than half the full registrants.

There were a few enquiries from third world countries requesting a reduced registration fee. The committee adopted the policy that if people from certain countries wrote requesting a reduced rate, they would be registered at the student rate (\$250 for the week).

Corporate registrations were permitted whereby a different employee could attend on each day. The company was registered as a Full delegate and the employees shared the name badge and

satchel - entry to sessions was by name badge only. Usually the badge and satchel were left at the Congress desk each night for the next person.

Persons cancelling their registration before 1 July 1988 were given a refund less an administrative charge of \$70. No refunds were given after 1 July (one month before Congress) unless there were extenuating circumstances and a request was received in writing. There were 13 people who registered but did not attend and were not refunded but a copy of the Proceedings were later sent to them.

Accommodation

Less than half the total number of registrants requested accommodation - with the Congress hotel (Sheraton Wentworth) taking the largest number. The YWCA (hostel) was very popular as were the serviced apartments. The breakdown was as follows:

| | |
|------------------------|-----|
| Sheraton Wentworth | 62 |
| YWCA Hostel | 32 |
| Beehive Apartments | 20 |
| Clairmont Inn | 16 |
| Cambridge Inn | 9 |
| Savoy Apartments | 8 |
| Intercontinental Hotel | 5 |
| Kingsview Hotel | 1 |
| | --- |
| Total | 153 |
| | --- |

Congress Desk

Co-Design, one of the major sponsors, designed and installed the "ergonomic" registration area including the Desk and seating area - it proved an excellent meeting area for all needs. There was plenty of space to service registrations and have the necessary equipment/documents in the one area. One of the best features was the high front on the Desk which separated the delegates from the actual working area.

Two microcomputers were at the registration desk together with the original registration forms and correspondence which allowed for prompt checks on registration or other queries. Such facilities and access to them is a **must** at the Congress Desk. Daily computerisation of on-site registrants and changes to delegates social and tourist plans enabled prompt and accurate information (and numbers) to be available at all times.

A cash register proved invaluable providing receipts, stamped by an official Ergonomics Society of Australia stamp. At the end of the day it produced a print-out of the day's transactions which was cross checked and balanced against the till.

A photocopier is a necessity as were three telephones, two at the Desk plus one in the nearby Secretariat office. Access to a facsimilie machine (in the hotel) was also helpful.

A Kroy or similiar lettering machine is essential to produce name badges for on-site registrants or to replace lost badges.

Volunteers & Briefing

The Congress relied on the assistance of many volunteers, mainly for the Congress Desk and in the Scientific Programme Office but also social, trade and public relations (see Appendix 2). Most volunteers were students who, in return for admission to some sessions, worked in half or full day shifts and did a marvellous job.

The briefing notes for volunteers on the Congress Desk is also given in Appendix 2

Problems

There were the usual problem of people not fully reading the registration material and thinking that they or their accompanying person were registered to attend all functions.

The main problem was people sending their registration without payment and not giving any reason. In most cases they had arranged for the fees to be paid for by bank transfer but, as they did not know the Congress bank (and account number), their money was transferred to various Australian banks. Those banks then had to contact AGENDA to arrange the transfer at a cost of \$5 to the Congress - it was difficult to marry up some of the figures with the actual registration forms as the banks would give very little detail on the sender.

The other problem was people writing or telephoning to say that they would definitely be attending and to please register them as their university or college was paying and they would bring the payment with them. In some cases they did not show up; in others they did not attend nor inform AGENDA that there had been a change in plans.

SPONSORSHIP

Some \$63,000 was obtained in sponsorship and includes grants from private companies, Government departments and others. A list of the sponsors is given in the *Report by Congress Treasurer to I.E.A. Council*. Most of the sponsorship was offset against actual expenditure, e.g. the Proceedings, delegates' satchels, name badges etc.

Very little practical advice about securing sponsorship can be given because of changes in the economic climate, different "cultures" and other local factors. Some of the background to our strategy and how it changed is given in the 1986 and 1987 Reports to Council.

A lot of hard work is required to prepare a special package to show potential sponsors "what's in it for them". However until you know who and how many might sponsor, the "deal" may have to be less tight than they might want. Even with potential sponsors there was still a lot of "selling" to do. Nothing can be guaranteed until it is in the bank.

CONCLUSION

The Organising committee feels that it has succeeded in making the 10th Congress of the International Ergonomics Association an event worthy of the rich IEA tradition which links the international ergonomics community.

We feel we have achieved our aims in raising the profile of ergonomics in Australia, and in providing an international forum for the exchange of ideas, knowledge and discussion of developments and directions in ergonomics. We are very pleased with the large number of overseas delegates from many countries which helped make IEA88 a truly international event. We were also able to achieve considerable press coverage which enabled the ergonomics message to reach the general public.

The committee strived to improve on the already high standard of IEA Congresses and we feel we did make some progress. Feedback at and after the Congress has shown our efforts were appreciated. For instance, name badges at conferences are always difficult to read so we made sure ours weren't (see sample below).

We feel we also made a start in raising the image of posters at conferences by publishing them as papers and by not differentiating between orals and posters in the Proceedings. We feel everybody enjoyed the social programme, reflecting its importance, as seen by us, in the necessity for informal interaction between delegates.

We purposely had an early finish to the scientific programme each day to allow for associated business and special interest group meetings to be held - it also allowed delegates some free time to do the necessities or enjoy some of Sydney's attractions.

The committee feels all its hard work was rewarded and we thank the IEA for allowing the Ergonomics Society of Australia to host the important, 10th Congress. We trust that this report is helpful to the organisers of the 11th Congress in Paris, 1991 and we wish them well in their endeavours.



DELEGATE

**ROGER
HALL
AUSTRALIA**

R R Hall Congress Chairman September 1989

Dear congress registrant,

Thank you for your registration for congress. A detailed confirmation of your bookings is enclosed. Your confirmation letter is also your receipt.

Upon your arrival in Sydney please collect your registration satchel from the congress desk. This will be located at the Sheraton-Wentworth Hotel, 3rd Floor Lobby, Philip Street, Sydney on the following days:


| | |
|-----------------|-------------------|
| Sunday, July 31 | 0900 - 1730 hours |
| August 1-5 | 0800 - 1700 hours |

You will need this registration material prior to the commencement of the congress to obtain your name badge for entrance to lecture sessions. The Welcome Reception will take place on Sunday evening, July 31, at 1800 hours at the Powerhouse Museum, Ultimo. Buses to transport delegates will leave from the Sheraton Wentworth Hotel from 5.30pm. Entry will be via name badges and invitation only.

Your satchel will contain final programme details, information on social events and congress activities, a copy of the Congress Proceedings, and information on Sydney.

We look forward to seeing you in Sydney in August 1988 for what we are sure will be a very exciting congress.

Yours faithfully,



ELIZABETH RICH
Congress Manager
10th International Ergonomics Congress
Ergonomics Society of Australia Inc.

26 July 1988

Dear Day Registrant,

Re: Congress Programme

Please find enclosed the latest information on the congress. Details of the congress programme are listed on the back page. Please note some changes have been made to the daily programme topics advertised in the Provisional Programme Brochure and this may affect the days you have registered to attend.

Should you wish to change the days that you have registered, please contact the secretariat as soon as possible to advise us of any alterations.

We look forward to seeing you at the congress.

Yours sincerely,



TRACEY BAILEY
Assistant Congress Manager
10th International Ergonomics Congress
Ergonomics Society of Australia Inc.

VOLUNTEERS NEEDED FOR IEA88

REGISTRATION:

Convenor of sub-committee

help packing satchels (6 persons)

help on registration desk during congress week (2-3 per day)
(general enquiries, sale of proceedings, hospitality, etc)

SCIENTIFIC:

Audio-visual person & assistants

Runners (2 per day)

Scientific office (2 - dealing with speakers & chairmen's queries)

1 person in speaker's lounge?

Person per session handling questions and floor mics - assisting chairman

One person assigned to each business meeting to handle any problems

2 persons supervising poster set-up on Sunday p.m./Monday a.m., change-over day, and break-down on Friday

Security people on doors for each session checking name badges

SOCIAL

2 persons per function welcoming and hostessing, liaising with entertainment, photographer, VIPs, etc.

2 persons at Sydney airport for welcome on Saturday and Sunday mornings

TRADE

1 person available during day all week to deal with exhibitors/sponsors queries

PUBLIC RELATIONS

2 persons to share responsibility of dealing with media

IEA 88 - CONGRESS DESK

BRIEFING

FULL DELEGATES:

1. Envelopes in alphabetical order, showing :
 - . surname
 - . given name
 - . title
 - . details of social events

2. GIVE THE DELEGATE THE FOLLOWING:
 - . his/her envelope
 - . a satchel (Final Programme inside)
 - . a set of Proceedings (check Vols. I & II)

3. IF THE DELEGATE'S ENVELOPE IS NOT THERE, THEN:
 - . he/she will be in the "owing" box, and should be sent to Tracey to pay BEFORE RECEIVING any material

 - or
 - . he/she is a sessional/day registrant and is in a separate box, and DOES NOT RECEIVE a copy of Proceedings.

 - or
 - . he/she has not as yet registered and should be directed to the on-site registration area to fill out a registration form and pay \$600 or \$150 per day

 - or
 - . there has been some problem in receipt of there registration and they should be sent to Tracey

4. ACCOMPANYING PERSONS

If a delegate has a registered accompanying person, then that person's envelope will be attached to the full delegate's envelope in the box. Give both envelopes to the delegate, explaining that the tickets for his/her accompanying person are in the second envelope so marked.

If there is no extra envelope and the delegate thinks there should be, check that he/she actually paid a registration fee of \$150 for the accompanying person.

5. DAY OR SESSIONAL REGISTRATIONS & STUDENTS

Day registrations are in a separate box, and all have BLUE DOTS on there envelopes to distinguish them. They are to receive the following:

- . their envelope
- . a satchel containing the final programme

(NB: NO PROCEEDINGS)

6. PROCEEDINGS

Every FULL delegate (i.e. paid \$485, \$550, or \$600 registration fee) is entitled to ONE SET OF PROCEEDINGS (2 volumes). Spare copies of the Proceedings will be available for sale at a cost of \$40 per set.

7. LIST OF CONGRESS PARTICIPANTS

A full list of names and addresses of registered delegates as at Wednesday, July 27, is available for sale at a cost of \$2.00 - 17 pages.

8. HANDLING MONEY

All money should be handled through the one person - the cashier. Official receipts (in addition to the cash register slip) should only be provided if requested.

9. REFUNDS

If any delegate is entitled to a refund, there will be a pink advice slip in his envelope. Refunds in cash are available from Peter Croft, the Congress Treasurer, who can be found in the Congress Secretariat Office directly opposite the congress desk on the 3rd level.

10. SALE OF SOCIAL TICKETS

Any queries relating to the Opera House evening on Tuesday should be directed to the Landmark representatives on the Tour Desk. The Opera and Concert are both now sold out, but enquiries regarding cancellations could be directed to the Tours Desk.

Persons may still purchase the following:

- . POWERHOUSE COCKTAIL RECEPTION \$30.00 per head
- . HARBOUR DINNER CRUISE (Monday) \$36.00 per head
- . AUSTRALIANA EVENING (Wednesday) \$50.00 per head
- . GALA DINNER (Thursday) \$75.00 per head

.../...

Congress Desk volunteers will be advised when tickets for the above functions are sold out. Those interested in booking the Harbour Cruise should do so immediately, as numbers are limited. There is only limited space left for the Gala Dinner so early bookings are advised. Don't suggest they drop back on Thursday - too late.

NO BLANK TICKETS SHOULD BE ISSUED, AND NO TICKETS SHOULD BE ISSUED WITHOUT PAYMENT.

11. REPLACEMENT NAME BADGES

Should someone need a new name badge, this can be provided. However, the old one should be collected, and a check should be made on the status of the person. Name Badges should not be issued at random. Care should be taken not to issue a white badge (full delegate) to replace a day (coloured) badge.

If the badge breaks and needs a new clip, spare clips are available.

Individuals registered under a company name (CORPORATE REGISTRATIONS) and sharing the company badge will find the name badge in the company name. THIS CANNOT BE TRANSFERRED TO AN INDIVIDUAL'S NAME, unless that individual only will be using the badge for the week and is prepared to return the corporate one.

13. THOSE WHO OWE MONEY

Tracey will be responsible for registering of those who still have outstanding amounts to pay. These envelopes can be found in a separate box with red dots and should NOT BE HANDED OUT without prove of full payment.

10th Congress International Ergonomics Association
1-5 August 1988 Sydney Australia



CONGRESS TREASURER'S REPORT TO I E A COUNCIL

20 May 1989

INTRODUCTION

This report presents a review of the financial business associated with Congress, covering budgeting, banking, security, expenditure and accounting. It presents a summary of account as at 20 May 1989, nine months after Congress. At that stage almost all financial transactions were completed, there remaining only a few minor matters needing attention before closing the books.

The financial affairs of Congress were managed by the Honorary Treasurer who reported to the Congress Organising Committee.

RESPONSIBILITIES OF TREASURER

1. Attend regular committee meetings, and advise the Organising Committee on all matters regarding finance and budget.
 2. Oversee maintenance of all financial records.
 3. Oversee preparation of Congress budget:
 - liaise with Congress Manager regarding the budget structure and the fee schedule
 - consolidate all sub-committee budgets
 4. Establish suitable financial arrangements for Congress:
 - cheque account at bank
 - loan/overdraft facilities
 - adequate insurance cover
 5. Manage regular financial affairs:
 - arrange banking of monies received
 - present accounts for approval
 - arrange payment of accounts
 - keep adequate books of account
 6. Monitor and report on financial affairs:
 - prepare regular financial statements of account
 - prepare regular reviews of expenditure against budget
 - propose modifications to budgets as necessary
 - prepare reports as necessary for ESA and IEA
 7. Prepare final statements and report at end of Congress.
 8. Arrange auditing of books of account at conclusion of business.
-

PRELIMINARY BUDGET

An expenditure budget was drafted in late 1986. This was reconstructed in February 1987, with the assistance of the Congress Manager. This was revised and developed into a preliminary income and expenditure budget in August 1987.

This budget structure and the setting of the Congress registration fees were determined on the basis of a break-even financial result, as reported to the IEA Council in August 1987. It was apparent that commercial sponsorship for the Congress was essential.

REGISTRATION FEE

The Congress registration fee was set on the basis of the following -

- (a) the costs incurred in convening and managing the event;
- (b) the number of delegates likely to attend;
- (c) the amount of sponsorship likely to be received from corporate sponsors, supporters and advertising sources;
- (d) a balanced, or "break-even", financial result;
- (e) a fee level regarded as "reasonable" for the nature of the event.

Details of determination of the basic registration fee are given in Attachment F-1. A basic registration fee of \$485 was recommended and accepted, and further budget planning proceeded on the basis of that figure.

The registration fee structure was later set as follows:

| | |
|------------------------------------|-------|
| - early fee (before 1 March 1988) | \$485 |
| - late fee (up to 25 July 1988) | \$550 |
| - on-site fee (after 25 July 1988) | \$600 |

The later fees were set to encourage early payment to assist the cash-flow situation. Provision was also made for partial registrations:

| | |
|------------------------------------|-------|
| - day registrations (per day) | \$150 |
| - student registrations (per day) | \$50 |
| - accompanying persons (total fee) | \$150 |

This fee structure was confirmed in October 1987 for printing in the Provisional Programme and Registration brochure.

OPERATING BUDGET

The preliminary budget of August 1987 was further developed, to incorporate the set registration fee structure and revised expenditure estimates, and was finalised in December 1987. A copy is shown in Attachment F-2.

The budget was conservatively set on the basis of attracting the minimum estimate of delegates (400), although a delegation somewhat greater than this was expected. Any increase in delegation above the 400 would result in a need for non-fees income at a level below the \$50,000 required by the budget.

Preliminary negotiations had indicated that \$5,000 would be available to support the final Congress Programme and \$12,000 to assist in printing the Proceedings, so that an additional \$33,000 would need to be attracted in grants and commercial sponsorship. Planning and monitoring proceeded on the basis of needing to ensure a total non-fees income of at least \$50,000.

The budget was subject to monthly review after December 1987; further major amendments were not found to be necessary.

FINANCIAL ARRANGEMENTS

Seeding Finance

As with all events of this type, funds were required early in the schedule to cover expenses associated with planning, whereas income would not be received until much later in the schedule. An essential and significant early demand on funds was for the employment of a Congress management agency.

Early seeding finance was available in 1986 from the IEA (US\$3,000) and from the host society ESA (Aust\$4,500), but further large amounts were essential during 1987 as discussed later.

Banking

All banking was conducted with the Government-sponsored Commonwealth Bank of Australia. A cheque account requiring the signatures of two Organising Committee members (drawn from the Chairman, the Treasurer and one other) was established.

Insurance

Insurance cover for the Congress event (for protection against cancellation or postponement), equipment and public liability was obtained from an agency specialising in Conference events.

Financial Backing

Modest sponsorship grants were first received in mid-1987, but substantial amounts were not expected until later in the year. It became clear that expenses would soon exceed funds available.

An overdraft facility with the bank was therefore obtained in mid-1987 to ensure payment of necessary accounts. This required that the ESA National President, the Congress Chairman and the Congress Treasurer act as personal guarantors for the risk - a situation regarded as undesirable, but necessary. The facility was used during mid-1987.

Requests were therefore made for further seeding finance from the IEA, and activities to attract early sponsorship were accelerated.

Two substantial grants were obtained in September 1987, and a further advance from the IEA was received in November. These, together with a substantial interest-free loan from a recent successful international conference, avoided the need for further use of the overdraft facility in meeting expenses. It was retained nevertheless as a security until June 1988.

Cash Flow

Registration monies (actual fees, plus transfer deposits for tours, accommodation, etc) were first received in December 1987 and were received at a slowly increasing rate through January and February 1988, so that by the end of February some 8% of these registration monies had been received. The rate of receipt then accelerated so that the proportion of such monies received by the end of each month grew as follows: by March (28%), April (43%), May (59%), June (71%) and July (84%).

At that stage, on the eve of Congress, the actual registration fee component of receipts had reached budget projections, and financial success was assured. Further registration monies flowed in during Congress week. At the end of August, three weeks after Congress, some 96% of all such fees and transfers ultimately taken had been received.

Investment

As registration monies were received, funds not needed immediately for payment of accounts were invested at 24-hour call in secure deposits with the Australian European Finance Corporation (majority owned by the Commonwealth Bank). This generated additional income.

Funds were recalled to the main operating account for payment of large accounts as the needs arose.

MANAGEMENT PROCEDURES

Income

All income received via the Secretariat was passed on to the Treasurer for recording and banking. Duplicate records of receipts were kept by the Secretariat.

Expenditure

The Congress Manager presented monthly accounts covering professional services rendered and operating expenses incurred by the Secretariat office. The Treasurer arranged payment for these and other major accounts that were presented directly.

All payments were formally approved by the Committee, and expenditure against individual budget item allocations was closely monitored and reviewed on a monthly basis.

Reporting

The Treasurer presented monthly reports to the Committee, covering the following:

- recent activities regarding receipts (registration and sponsorship), major expenditure and investment;
- accounts requiring approval;
- current financial situation and reconciliation with bank statements;
- review of income and expenditure against budget allocations and projections.

ON-SITE ARRANGEMENTS

During the Congress week the Registration Desk handled receipt of on-site registration fees, and over-counter sales (literature, social events, etc).

The Treasurer's office handled normal income and expenditure tasks, refunds (most of which were arranged and prepared prior to Congress), on-site staff payments, expense claims, and payment of allowances to keynote and invited speakers. The office was also responsible for clearance and banking of monies received at the desk, daily accounting and reconciliation with cash register records, and overnight safe-keeping.

More than \$30,000 (mostly in cash) was turned over during the Congress week.

FINANCIAL OUTCOME

The Tables in Attachment F-3 summarise the financial outcome of Congress, as follows:

Table I FINANCIAL OVERVIEW

This presents an overview of all transactions associated with Congress, indicating major components of income and expenditure.

- Features:
- Total turnover was around \$450,000
 - A comfortable operating surplus was realised, residual funds being around \$90,000

Table II INCOME OVERVIEW

This presents a breakdown of major income components and compares them with budget projections.

- Features:
- Registration receipts exceeded projections by \$57,000
 - Sponsorship receipts exceeded projections by \$13,000
 - Bank interest receipts from investment (not included in budget) exceeded \$10,000

Table III BUDGET EXPENDITURE OVERVIEW

This presents a breakdown of major expenditure categories and compares this with budget allocations.

- Features:
- Total expenditure was around \$250,000
 - Expenditure on fixed costs was contained within the budget allocation
 - Expenditure on variable costs exceeded budget because final attendance exceeded projections

Table IV BUDGET EXPENDITURE REVIEW

This presents a detailed breakdown of expenditure against individual budget items.

- Features:
- Expenditure on most items was very close to budget allocations

GENERAL COMMENTS

An underlying contribution to financial success was that the budget was conservatively structured. This was regarded as necessary in the interests of meeting the capitation fee requirements of the IEA, avoiding a financial impost upon the IEA in the event of an operating loss, and in view of the fragile financial state of the ESA which precluded it from underwriting the event to any great extent.

As it eventuated, the financial success enabled the IEA commitments to be met, and all advances and loans to be repaid within two months of Congress.

The operating surplus was brought about by several factors:

- registration receipts exceeded the budget projections by a substantial margin, because of a greater number of delegates and a greater proportion of late fees to basic fees;
- sponsorship monies exceeded the budget projections significantly;
- the opportunity to invest substantial funds for a short period generated additional income;
- expenditure on fixed cost components was contained within budget;
- a favourable shift in international currency exchange rates enabled a small surplus to be realised upon repayment of advances;
- significant savings were made in the area of technical staff and equipment, by utilising the facilities provided by the function centre rather than using external services.

Another factor underlying the success was that the basic budget planning was undertaken with the assistance of professional congress management advice.

DISBURSEMENT OF RESIDUAL FUNDS

The residual funds were disbursed in accordance with the policy of the ESA, and in acknowledgement of the IEA proposals for disbursement from such events.

As part of this, an amount of 10,000 Swiss Francs was forwarded to the IEA for the establishment of a fund for the sponsorship of Ergonomics conferences in developing nations.

Details of the disbursement are given in **Attachment F-4**.

CLOSURE

When outstanding minor transactions have been completed, all books of account will be audited professionally, as required by the ESA, and the financial business of Congress will be closed. A copy of the auditor's report will be forwarded to the IEA Treasurer in due course.



P G Croft
Hon Treasurer
20 May 1989

DETERMINATION OF REGISTRATION FEE

$$\begin{aligned} \text{TOTAL INCOME} &= \text{Registration Fees} + \text{Sponsorship} \\ &= (A.R + S) \end{aligned}$$

where

$$\begin{aligned} A &= \text{number of delegates} \\ R &= \text{registration fee per delegate} \\ S &= \text{total sponsorship} \end{aligned}$$

and

$$\begin{aligned} \text{TOTAL EXPENDITURE} &= \text{Total Costs} + 5\% \\ &= 1.05(\text{Fixed Costs} + \text{Variable Costs}) \\ &= 1.05 (K + A.V) \end{aligned}$$

where

$$\begin{aligned} K &= \text{total fixed costs} \\ V &= \text{variable cost per delegate} \end{aligned}$$

For a balanced (break-even) budget,

$$\text{TOTAL INCOME} = \text{TOTAL EXPENDITURE}$$

that is,

$$A.R + S = 1.05 (K + A.V)$$

so that,

$$R = \frac{1.05 (K + A.V) - S}{A}$$

This relationship between registration fee, costs, attendance and sponsorship is shown graphically in the attached diagram, which indicates the influence of levels of attendance and sponsorship on determination of an appropriate registration fee.

The fixed and variable costs (K and V) were determined from the preliminary budget expenditure schedule of August 1987, as follows:

$$\begin{aligned} K &= \$163,500 \\ V &= \$170 \end{aligned}$$

Some pre-determined and practical limits were then set on other variables, as follows:

- (a) registration fee should be kept below \$500;
- (b) attendance is likely to be between 400 and 500;
- (c) sponsorship is likely to be between \$20,000 and \$50,000.

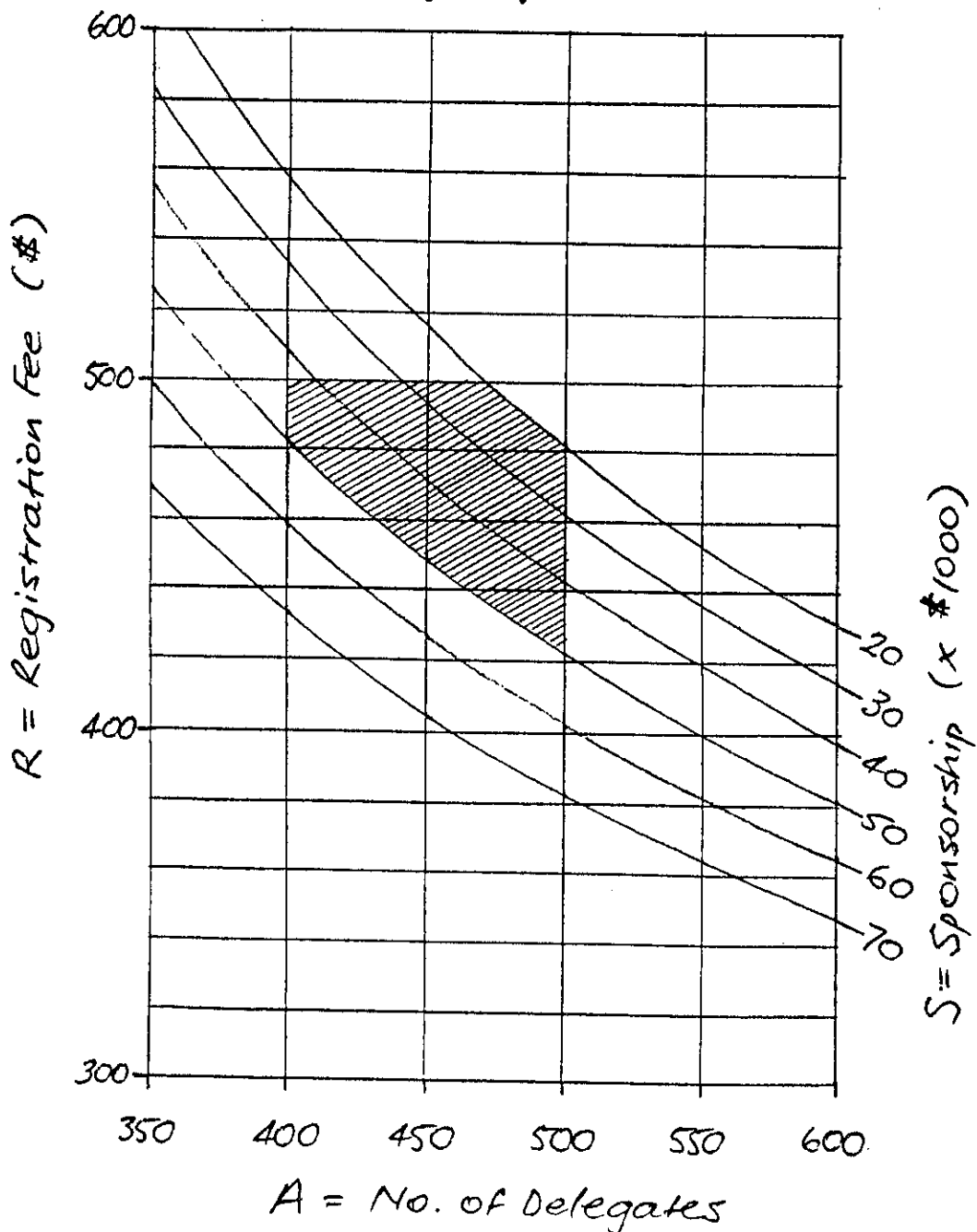
These limits defined the shaded portion of the diagram from which the likely practical influences of attendance and sponsorship levels were interpreted.

On the basis of an attendance of 400 delegates, and a sponsorship level of \$50,000 a basic registration fee of \$483 would be required. A basic fee of \$485 was recommended.



10th IEA CONGRESS - 1988

- Fixed Costs: \$163,500
- Variable Cost per delegate: \$170
(includes IEA capitation fee
(and Congress management fee))
- Contingency on total costs: 5%



BUDGETED EXPENDITURE & INCOME

24 December 1987

EXPENDITURE

FIXED COSTS

(\$ Aust.)

ADMINISTRATION

| | | | |
|-----|----------------------------------|--------|--------|
| 101 | Management/Secretariat - N. Ryan | 10,000 | |
| 102 | Management/Secretariat - AGENDA | 18,000 | |
| 103 | Telephone/Telex/Fax | 2,000 | |
| 104 | Couriers | 1,000 | |
| 105 | Photocopying | 2,000 | |
| 106 | On-site office equipment | 1,000 | |
| 107 | Consultancy services | 500 | |
| 108 | Gen'l materials, services | 1,000 | |
| 109 | Legal services | 1,300 | |
| | | | 36,800 |

FINANCIAL

| | | | |
|-----|-------------------------|-------|-------|
| 201 | Bank Charges, Overdraft | 1,000 | |
| 202 | Insurance | 3,000 | |
| | | | 4,000 |

VENUE HIRE

| | | | |
|-----|---------------------------|--------|--------|
| 301 | Main Ballroom | 16,000 | |
| 302 | Brisbane/Canberra Rooms | 13,750 | |
| 303 | 5th Floor Break-out Rooms | 10,000 | |
| | | | 39,750 |

SCIENTIFIC PROGRAMME

| | | | |
|-----|-----------------------------|--------|--------|
| 401 | Technical staff & equipment | 20,000 | |
| 402 | Poster display boards | 2,000 | |
| 403 | Spotlights | 0 | |
| 404 | Authors instructions | 500 | |
| 405 | Satchels | 2,000 | |
| | | | 24,500 |

PRINTING

| | | | |
|-----|------------------------------|--------|--------|
| 501 | Letterhead/envelopes | 2,000 | |
| 502 | Initial Announcement | 0 | |
| 503 | Call for Contributions | 900 | |
| 504 | Registration Brochure | 0 | |
| 505 | Registration acknowledgement | 1,000 | |
| 506 | Final Programme | 5,000 | |
| 507 | Name badges | 750 | |
| 508 | Invitations/tickets | 2,500 | |
| 509 | Satchel envelopes | 500 | |
| 510 | On-site signs | 2,000 | |
| 511 | Proceedings | 12,000 | |
| 512 | General stationery | 500 | |
| | | | 27,150 |

POSTAGE

| | | | |
|-----|------------------------|-------|-------|
| 601 | Initial Announcement | 500 | |
| 602 | Call for Contributions | 500 | |
| 603 | Registration Brochure | 2,500 | |
| 604 | Acknowledgement Forms | 500 | |
| 605 | General Correspondence | 2,500 | |
| 606 | Promotional Material | 1,000 | |
| 607 | Authors instructions | 1,000 | |
| | | | 8,500 |

PROMOTION

| | | | |
|-----|-----------------------------------|-------|-------|
| 701 | IEA 85 - R. Hall (FOC ticket) | 400 | |
| 702 | IEA Council Mtg 1987 - R. Hall | 0 | |
| 703 | HFS N.Y. 1987 - ESA rep (FOC tkt) | 1,000 | |
| 704 | Travel within Australia | 1,000 | |
| 705 | Materials (posters, inserts, etc) | 2,000 | |
| 706 | Media Kits | 1,000 | |
| | | | 5,400 |

ON-SITE EXPENSES

| | | | |
|-----|-----------------------------------|-------|-------|
| 801 | Secretarial Staff | 2,100 | |
| 802 | Limited translation service | 500 | |
| 803 | Entertainment (Congress Chairman) | 1,000 | |
| | | | 3,600 |

COMPLIMENTARY

| | | | |
|-----|-----------------------------------|--------|--------|
| 901 | Registrations (3 @ \$550) | 1,650 | |
| 902 | Dinner Guests (15 @ \$50) | 750 | |
| 903 | Welcome Reception (20 @ \$30) | 600 | |
| 904 | Invited Speakers (8 @ \$1500 max) | 12,000 | |
| | | | 15,000 |

SUB-TOTAL FIXED COSTS 164,700

VARIABLE COSTS

| | | per delegate | for 400 delegates | |
|------|--------------------|-----------------|----------------------|--------|
| 1000 | IEA CAPITATION FEE | 25 | 10,000 | 10,000 |
| 1100 | MGT/PROCESSING FEE | 50 | 20,000 | 20,000 |
| | FOOD & BEVERAGE | | | |
| 1201 | Welcome Reception | 30 | 12,000 | |
| 1202 | Congress Dinner | 50 | 20,000 | |
| 1203 | Coffee Breaks | 15 | 6,000 | |
| | | | | 38,000 |

SUB-TOTAL VARIABLE COSTS 68,000

| | | |
|--|--|----------------|
| TOTAL EXPENDITURE | | (\$ Aust.) |
| SUB-TOTAL FIXED COSTS | | 164,700 |
| SUB-TOTAL VARIABLE COSTS (400 delegates) | | 68,000 |
| ----- | | |
| TOTAL COSTS (400 delegates) | | 232,700 |
| Plus 5% Contingency | | 11,635 |
| ----- | | |
| TOTAL EXPENDITURE (400 delegates) | | 244,335 |
| ----- | | |

REGISTRATION ESTIMATE

| | |
|-----------------------------------|---------|
| TOTAL EXPENDITURE (400 delegates) | 244,335 |
| Less Non-Fees Income (say) | 50,000 |
| | ----- |
| NETT EXPENDITURE | 194,335 |
| | ----- |
| NETT COST per delegate (+400) | 486 |
| | ----- |

INCOME

REGISTRATION FEES

| | | |
|--------------------------------------|---------|---------|
| Full Registrations (say 300 @ \$485) | 145,500 | |
| Late Registrations (say 100 @ \$550) | 55,000 | |
| | | 200,500 |

SPONSORSHIP/ADVERTISING/SUPPORT

| | | |
|---------------------------|--------|--------|
| Final Programme | 5,000 | |
| Proceedings | 12,000 | |
| Sponsors/Supporters (say) | 33,000 | |
| | | 50,000 |

| | | |
|---------------------|--|----------------|
| TOTAL INCOME | | 250,500 |
| ----- | | |

FINANCIAL OUTCOME SUMMARY

| | |
|-----------|-----------------------------|
| Table I | FINANCIAL OVERVIEW |
| Table II | INCOME OVERVIEW |
| Table III | BUDGET EXPENDITURE OVERVIEW |
| Table IV | BUDGET EXPENDITURE REVIEW |

INTERNATIONAL ERGONOMICS ASSOCIATION
10th CONGRESS - SYDNEY AUSTRALIA - AUGUST 1988

Table I

FINANCIAL OVERVIEW at

20 MAY 1989

INCOME RECEIVED

SPONSORSHIP/SUPPORT

| | | |
|--------------------------|-------------|--------------|
| * Grants | \$63,100.00 | |
| * Special Grant (Bendix) | \$8,720.00 | |
| * Loans | \$25,000.00 | |
| * Advances | | |
| - IEA | \$11,473.18 | |
| - ESA | \$4,500.00 | |
| | | \$112,793.18 |

REGISTRATIONS

| | | |
|------------------------------|--------------|--------------|
| * Actual Congress fees | \$257,439.23 | |
| * Deposits (accom/tours/soc) | \$56,776.45 | |
| | | \$314,215.68 |

SALES \$7,956.70

INTEREST \$10,691.82

MISCELLANEOUS \$4,854.98

TOTAL INCOME \$450,512.36

EXPENDITURE

| | | |
|--|--------------|--|
| * Budget Expenditure (see details attached) | \$251,776.68 | |
| * Transfer Payments (deposits) | \$59,284.95 | |
| * Bendix Visit | \$8,720.00 | |
| * Repayments | \$39,388.64 | |

TOTAL EXPENDITURE \$359,170.27

RESIDUAL FUNDS \$91,342.09

Table II

INTERNATIONAL ERGONOMICS ASSOCIATION
10th CONGRESS - SYDNEY AUSTRALIA - AUGUST 1988

INCOME OVERVIEW at

20 MAY 1989

| INCOME COMPONENTS | Budget Projection | Actual Receipts |
|-------------------|----------------------|--------------------|
| Registration Fees | \$200,500.00 | \$257,439.23 |
| Sponsorship | \$50,000.00 | \$63,100.00 |
| Sales | (nil) | \$7,956.70 |
| Interest | (nil) | \$10,691.82 |
| Miscellaneous | (nil) | \$4,854.98 |
| TOTAL | \$250,500.00 | \$344,042.73 |

SPONSORSHIP DETAILS

| Sponsor | Amount |
|---------------------------|-----------------|
| * Taylor & Francis | \$12,000.00 |
| * Co-Design | \$10,000.00 |
| * Dept I R E (NSW) | \$10,000.00 |
| * NOHSC | \$7,500.00 |
| * Suspa | \$5,000.00 |
| * Telecom | \$5,000.00 |
| * Nat Safety Council | \$2,000.00 |
| * QANTAS | \$2,000.00 |
| * Mutual Risk Mgt | \$2,000.00 |
| * Stratos Seats | \$1,200.00 |
| * Paragon 2000 | \$1,000.00 |
| * Volvo | \$1,000.00 |
| * D A Book | \$1,000.00 |
| * Atlas-Copco | \$750.00 |
| * Percy Marks | \$750.00 |
| * Uni Technol Syd (NSWIT) | \$500.00 |
| * Watts Furniture | \$500.00 |
| * Cumberland College | \$500.00 |
| * Australian Airlines | \$400.00 |
| TOTAL GRANTS RECEIVED | \$63,100.00 |

Table III

INTERNATIONAL ERGONOMICS ASSOCIATION
10th CONGRESS - SYDNEY AUSTRALIA - AUGUST 1988

BUDGET EXPENDITURE OVERVIEW to 20 MAY 1989

| ITEM | BUDGET AMOUNTS AT 24 DECEMBER 87 | EXPENDITURE UP TO 20 MAY 89 |
|--------------------------|-------------------------------------|--------------------------------|
| ----- | | |
| FIXED COSTS | | |
| * ADMINISTRATION | \$36,800 | \$39,353.85 |
| * FINANCIAL | \$4,000 | \$3,577.31 |
| * VENUE HIRE | \$39,750 | \$44,700.00 |
| * SCIENTIFIC PROGRAM | \$24,500 | \$14,990.88 |
| * PRINTING | \$27,150 | \$28,463.47 |
| * POSTAGE | \$8,500 | \$8,277.72 |
| * PROMOTION | \$5,400 | \$4,756.66 |
| * ON-SITE EXPENSES | \$3,600 | \$4,324.13 |
| * COMPLIMENTARY | \$15,000 | \$13,889.20 |
| ----- | | |
| SUB-TOTAL FIXED COSTS | \$164,700 | \$162,333.22 |
| ----- | | |
| VARIABLE COSTS | | |
| * IEA CAPITATION FEE | \$10,000 | \$9,337.98 |
| * MGT/PROCESSING FEE | \$20,000 | \$27,100.00 |
| * FOOD & BEVERAGE | \$38,000 | \$38,969.79 |
| ----- | | |
| SUB-TOTAL VARIABLE COSTS | \$68,000 | \$75,407.77 |
| ----- | | |
| TOTAL COSTS | \$232,700 | \$237,740.99 |
| * Contingency | \$11,635 | \$14,035.69 |
| ----- | | |
| TOTAL BUDGET EXPENDITURE | \$244,335 | \$251,776.68 |
| ----- | | |

Table IV

INTERNATIONAL ERGONOMICS ASSOCIATION
10th CONGRESS - SYDNEY AUSTRALIA - AUGUST 1988

BUDGET EXPENDITURE REVIEW at 20 MAY 1989

| ITEM | DESCRIPTION | BUDGET AMOUNTS AT 24 DECEMBER 87 | EXPENDITURE UP TO 20 MAY 1989 |
|---------------------------|---------------------------|-------------------------------------|----------------------------------|
| ADMINISTRATION | | | |
| 101 | Mgt/Sect - N. Ryan | \$10,000 | \$10,500.00 |
| 102 | Mgt/Sect - AGENDA | \$18,000 | \$18,000.00 |
| 103 | Telephone/Telex/Fax | \$2,000 | \$1,756.09 |
| 104 | Couriers/Transport | \$1,000 | \$1,860.62 |
| 105 | Photocopying | \$2,000 | \$1,699.20 |
| 106 | On-site office equipt | \$1,000 | \$758.95 |
| 107 | Consultancy services | \$500 | \$280.00 |
| 108 | Gen'l materials, services | \$1,000 | \$3,194.49 |
| 109 | Legal services | \$1,300 | \$1,304.50 |
| | SUB-TOTAL | \$36,800 | \$39,353.85 |
| FINANCIAL | | | |
| 201 | Bank charges, Overdraft | \$1,000 | \$655.66 |
| 202 | Insurance | \$3,000 | \$2,921.65 |
| | SUB-TOTAL | \$4,000 | \$3,577.31 |
| VENUE HIRE | | | |
| 301 | Main Ballroom | \$16,000 | \$17,000.00 |
| 302 | Brisbane/Canberra room | \$13,750 | \$16,500.00 |
| 303 | 5th Floor rooms | \$10,000 | \$11,200.00 |
| | SUB-TOTAL | \$39,750 | \$44,700.00 |
| SCIENTIFIC PROGRAM | | | |
| 401 | Tech staff & equipment | \$20,000 | \$12,687.50 |
| 402 | Poster display boards | \$2,000 | \$1,740.18 |
| 403 | Spotlights | \$0 | |
| 404 | Authors instructions | \$500 | \$563.20 |
| 405 | Satchels | \$2,000 | |
| | SUB-TOTAL | \$24,500 | \$14,990.88 |
| PRINTING | | | |
| 501 | Letterhead/envelopes | \$2,000 | \$2,392.60 |
| 502 | Initial announcement | \$0 | \$593.60 |
| 503 | Call for contributions | \$900 | \$853.00 |
| 504 | Registration brochure | \$0 | \$429.00 |
| 505 | Registration acknowl'mt | \$1,000 | |
| 506 | Final Program | \$5,000 | \$6,840.00 |
| 507 | Name badges | \$750 | \$2,104.20 |
| 508 | Invitations/tickets | \$2,500 | \$1,016.82 |
| 509 | Satchel envelopes | \$500 | \$110.00 |
| 510 | On-site signs | \$2,000 | \$463.00 |
| 511 | Proceedings | \$12,000 | \$13,654.00 |
| 512 | General stationery | \$500 | \$7.25 |
| | SUB-TOTAL | \$27,150 | \$28,463.47 |

POSTAGE

| | | | | |
|-----|------------------------|---------|------------|------------|
| 601 | Initial announcement | \$500 | \$16.90 | |
| 602 | Call for contributions | \$500 | \$500.19 | |
| 603 | Registration brochure | \$2,500 | \$2,518.75 | |
| 604 | Acknowledgement form | \$500 | \$100.00 | |
| 605 | General correspondence | \$2,500 | \$3,223.31 | |
| 606 | Promotional material | \$1,000 | \$625.45 | |
| 607 | Authors instructions | \$1,000 | \$1,293.12 | |
| | SUB-TOTAL | \$8,500 | | \$8,277.72 |

PROMOTION

| | | | | |
|-----|--------------------------|---------|------------|------------|
| 701 | IEA85 - R.Hall | \$400 | \$372.78 | |
| 702 | IEA Council mtg 1987 | \$0 | | |
| 703 | HFS NY 1987 - ESA rep | \$1,000 | \$1,573.65 | |
| 704 | Travel in Australia | \$1,000 | | |
| 705 | Materials (posters, etc) | \$2,000 | \$1,630.23 | |
| 706 | Media kits | \$1,000 | \$1,180.00 | |
| | SUB-TOTAL | \$5,400 | | \$4,756.66 |

ON-SITE EXPENSES

| | | | | |
|-----|-----------------------------|---------|------------|------------|
| 801 | Secretarial staff | \$2,100 | \$305.00 | |
| 802 | Limited translation | \$500 | | |
| 803 | Entertainm't (Chairman) | \$1,000 | \$755.68 | |
| 804 | Committee expenses | \$0 | \$2,757.25 | |
| 805 | Services (phone, fax, copy) | \$0 | \$506.20 | |
| | SUB-TOTAL | \$3,600 | | \$4,324.13 |

COMPLIMENTARY

| | | | | |
|-----|----------------------------|----------|-------------|-------------|
| 901 | Registrations (3 @ \$550) | \$1,650 | | |
| 902 | Dinner guests (15 @ \$50) | \$750 | | |
| 903 | Reception (20 @ \$30) | \$600 | \$657.90 | |
| 904 | Inv. speakers (8 @ \$1500) | \$12,000 | \$11,389.00 | |
| 905 | Gifts | \$0 | \$1,842.30 | |
| | SUB-TOTAL | \$15,000 | | \$13,889.20 |

SUB-TOTAL FIXED COSTS

\$164,700 \$162,333.22

VARIABLE COSTS

| | | | | | |
|------|---------------------|---|------|----------|----------------------------|
| | Number of Delegates | @ | 400 | | |
| 1000 | IEA CAPITATION FEE | @ | \$25 | \$10,000 | \$9,337.98 \$9,337.98 |
| 1100 | MGT/PROCESSING FEE | @ | \$50 | \$20,000 | \$27,100.00 \$27,100.00 |

FOOD & BEVERAGE

| | | | | | |
|------|-------------------|---|------|----------|-------------|
| 1201 | Welcome Reception | @ | \$30 | \$12,000 | \$12,610.00 |
| 1202 | Congress Dinner | @ | \$50 | \$20,000 | \$21,094.79 |
| 1203 | Coffee Breaks | @ | \$15 | \$6,000 | \$5,265.00 |
| | SUB-TOTAL | | | \$38,000 | \$38,969.79 |

SUB-TOTAL VARIABLE COSTS

\$68,000 \$75,407.77

TOTAL COSTS

\$232,700

Plus 5% Contingency

\$11,635 \$14,035.69 \$14,035.69

TOTAL EXPENDITURE

\$244,335 \$251,776.68

DISBURSEMENT OF IEA88 CONGRESS RESIDUAL FUNDS

1. To ERGONOMICS SOCIETY OF AUSTRALIA (Federal)

| | |
|------------------------------------|-------------|
| Contribution to Consolidated Funds | \$30,000.00 |
|------------------------------------|-------------|

To be used for -

- the provision of financial assistance to facilitate attendance of ESA representative at IEA Council meetings;
- the marketing and promotion of ergonomics and the Society;
- the provision of advance financial support for the conduct of ESA Conferences.

2. To ERGONOMICS SOCIETY OF AUSTRALIA (NSW Branch)

| | |
|----------------------------------|-------------|
| Contribution to NSW Branch Funds | \$30,000.00 |
|----------------------------------|-------------|

Reimbursement and compensation to NSW Branch as host and major contributor to organisation of IEA88 Congress.

3. (a) To INTERNATIONAL ERGONOMICS ASSOCIATION

Establishment of fund in the name of the Ergonomics Society of Australia, for sponsorship of Ergonomics Conferences in developing nations, with particular emphasis on the South East Asian and South Pacific regions.

| | |
|------------------------------------|------------|
| Nominated amount SF 10,000: approx | \$8,000.00 |
|------------------------------------|------------|

(b) To ERGONOMICS SOCIETY OF AUSTRALIA (Branches)

Contribution to Branch operating funds, to be shared equally among remaining Branches (Vic, ACT, SA, Qld, WA)

| | |
|------------------------|-------------|
| Residual funds, approx | \$22,000.00 |
|------------------------|-------------|

| | |
|---|--------------------|
| TOTAL FUNDS FOR DISBURSEMENT: approx | \$90,000.00 |
|---|--------------------|
