Conference Sample Event Checklist

KEY TERMS:

√ Conferences – events with 1,000 <u>or fewer</u> attendees that generally last at least two days.

√ Conventions – events with 1,000 – 19,999 attendees that generally last at least two days.

√ City-wide conventions – events with 20,000 <u>or more</u> attendees on a peak night that generally last at least two days.

√ Event planning group – can also be referred to as conference planning committee, host committee, or a variety of other names. Ultimately this group is responsible for the overall success of the conference. Generally conference event planning groups include a programming, logistics, development (when it is a private sector conference), and marketing representative.

√ Meeting specifications – information that the person in charge of logistics submits to the hotel. Depending on the event, this information varies. Generally speaking, meeting specifications include: catering, meeting agenda, audio visual requirements, housing list, and VIP information.

√ Session review process – more commonly known as request for proposal (RFP), this process is when the programmatic lead for a conference receives, reviews, evaluates, and accepts/denies proposals. Many conferences/conventions use a virtual platform, i.e., DoubleDutch, to seamlessly manage this workload. In recent years, many organizations have foregone the RFP process and opted to personally invite speakers who match their programmatic objectives.

√ Target audience – the dominant group of individuals that an organization wants at their event. Identifying this group of people is important because it can influence the size, cost, and marketing strategy for a conference.

Task	Owner	Collaborator	Recommended Due Date	Status	Special Notes/Helpful Tips
Define event purpose			One year from event date		
Identify your target audience			One year from event date		This number directly links to how you budget for the event
Identify a high-level agenda			One year from event date		This document will influence your venue decisions, as well as your overall expenses. Some key questions to consider: - How long should the conference be to meet the desired outcomes? - How many educational, networking, and keynote sessions do I need to offer? - Which meals would I like to be responsible for?
Identify your event planning work group			One year from event date		
Outline all expenses			One year from event date		Note – If your conference is charging a registration fee you will want to identify how much your fees will cover the cost of the event
Develop a budget			One year from event date		
Get your budget approved			One year from event date		
Conduct a site visit for the conference location			8-10 months prior to event date		
Select a venue			8-10 months prior to event date		
Conduct a preliminary review of the venue contract (non-legal)			8-10 months prior to event date		
Get contract approved			8-10 months prior		
Schedule event planning committee meetings			8-10 months prior to event date		

Task	Owner	Collaborator	Recommended Due Date	Status	Special Notes/Helpful Tips
Develop conference logo and overall conference branding			10 months prior to event date		
Develop conference website			8-10 months prior to event date		
Develop conference marketing plan			8-10 months prior to the event date		
Develop session review process			8-10 months prior to the event		
Develop rubric to review session submissions			8-10 months prior to event date		
Develop template for session invitations			8-10 months prior to event date		
Begin confirming speakers			8-10 months prior to event date		
Launch registration			6-8 months prior to event date		
Begin reporting on registration			6-8 months prior to event date		
Marketing push (optional)			4-6 months prior to event date		If numbers are low, consider free/virtual ways to increase registration numbers
Consider program book plan			4-6 months prior to event date		
Schedule all pre-event meetings, i.e., volunteer meetings, core team trainings, and registration training			4-months prior to event date		
Order all onsite materials, i.e., signage, program book, bags, etc.			3 months prior to event date		These items may be adjusted based on your expected attendance and overall financial outlook
Submit preliminary meeting specifications, i.e., catering, meeting set and audio visual to the conference location			2-3 months prior to event date		

Task	Owner	Collaborator	Recommended Due Date	Status	Special Notes/Helpful Tips
Program book editing cycle			2-3 months prior to event date		
Program book goes to print			1-2 months prior to event date		
Submit final/updated meeting specifications, i.e., catering, meeting and audio visual to the conference location			1-2 weeks prior to event date		Most hoteliers require final information at least one full week prior to the event date, with signature required 72 hours prior.
Final communication to attendees (optional)			1-2 weeks out prior to event date		
Send post event assessment			I minute after the conference concludes		
Send all event related thank you's			72 hours after the conference concludes		
Reconcile the bill			Timeline will be per the contract		
Facilitate event debrief meeting			4 weeks after the conference concludes		Intentionally, four weeks post the event date is requested to allow time to receive, review, and analyze the event data.