Conference Planning Checklist

☐ Conference Dates ________________________

☐ Facilities/location: _______________________________________

☐ Budget: _________________________________________________

☐ General schedule (#sessions, times/duration, lengths of days, breaks)
   _______________________________________________________
   _______________________________________________________
   _______________________________________________________

☐ Conference Theme:
   _______________________________________________________

☐ Assignment/Allocation of roles/Responsibilities of Planning Team Members
   Team member___________________________________________
   Team member___________________________________________
   Team member___________________________________________
   Team member___________________________________________
   Team member___________________________________________
   Team member___________________________________________
This checklist is extensive but can be modified to accommodate the conference planning as needed.

Conference Planning categories:

- Presenters
  - Keynote speakers
  - General session speakers
  - Moderators
  - Opening/closing/housekeeping
- Budget/Financial (create a budget)
  - Existing funding
  - In kind assistance
  - Additional funding/donations
  - Fundraising
  - Speaker fees/costs
- PR/Promotional/Informational materials
  - Save the date
  - Promotional materials with presenters/location/registration fees/link to register
  - Informational materials with extended information (travel options, hotels, access, training site, etc)
  - Audience
  - Frequency of promotions
  - Logos/conference theme/colors/photos
  - Media releases
- Conference registration
  - Type of registration program used
  - Questions/information gathered via registration
  - Participant needs (access, allergies, medical supports)
  - Minimum/maximum # participants
  - Name tags/lanyards
  - Sign in/out system
  - Conference bags/assembly of bag items
- Conference bag design and order
- Registration set up and location at conference
- Information “booth”
- Conference Program
  - Logos/colors/photos/overall “look”
  - Schedule/agenda
  - Special recognition/announcements
  - Speakers
  - Dates/location
  - Facility/location/facility maps
- Time lines (due dates to planning committee)
  - Speaker confirmations
  - Power points/handouts/materials
  - Speaker travel plans (flight, hotel)
  - Speaker requests for on-site materials and/or room set up
- CEU’s
  - Types of CEU’s offered
  - Timelines for submitting paperwork
  - Cost of CEU’s
  - Preparation for certificates or tracking of CEU’s for participants
- Session planning
  - Room set up (tables/chairs, room configurations)
  - Technology needed
  - IT specialist needed
  - Access needs
  - Podiums/stages
  - Number of rooms needed
- Hotel
  - Conference hotel or use of several in location
  - Communication with hotel
  - Use of hotel transportation/shuttle to-from airports
  - Access training
- Meal planning
- Catering use at conference site
- In-restaurant meals
- # of meals/refreshment breaks planned
- Food set up on site

☐ On site planning
- Cost of facility use
- Parking needs
- Signage
- Additional room for interpreters/captionists
- Additional room for conference materials/staging room
- Technology available
- Tech support available
- Staff to do room set ups
- Room name/numbers for program use
- Assign sessions to rooms based on room size, location, lighting, etc

☐ Signage
- Directional signs
- Informational signs
- Recognition banners
- Logos/colors/theme/conference name

☐ Access
- Interpreters
- Captionists
- Large print/technology use
- Parking lot/building entrance access
- Microphones
- Lighting
- Program schedules, session information to interpreters/captionists in advance
- Presenter communication preferences

☐ Transportation
- Provision of transport to/from
- Transportation schedules
- Cost of transportation
- Use of bus/taxi companies
- Use of personal vehicles

☐ Exhibits
- Promotional materials
- Information sheet (site/location/space size/outlets/wifi)
- Fee for exhibitors
- Site location for exhibitors
- Schedule for exhibiting, including breaks
- Provision of tables, chairs
- Provision of meals
- Access to sessions
- Assistance with set up
- Communication access
- Maximum/minimum # of exhibitors

☐ Shopping List
- Presenter thank you gifts
- Supplies (tape, paper, extra gifts)
- Items for participant conference bags
- Snacks/candy for tables
- Flip charts, markers

☐ Conference tool kit
- Tape, scissors, paper, markers, pens and pencils
- Original of every presenter’s handouts/resources
- Travel plans for every presenter
- Copy of all contracts for caterers, transportation, etc
- Emergency # for local pharmacy, hospital, urgent care
- First aid kit

☐ Conference evaluations
- Electronic or hard copy
- Collection and review
- Evaluations reviewed and documented for future planning, copies of evaluations to corresponding presenters
☐ Conference wrap-up
  - All presenters to airport or other departure
  - All participants cared for/assisted to destination, etc
  - Signage removed
  - All materials/equipment packed up
  - Thank you gifts to point of contact of facility
  - Payment for transportation, caterers, hotels processed
  - Payment to presenters processed
  - Create packet with sample materials, etc for future planning
  - Follow up information to participants, if appropriate
  - Debrief meeting with conference planning team