

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 _____

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