



Conference Sample Event Checklist

KEY TERMS:

- ✓ Conferences – events with 1,000 or fewer 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 or more 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.

Helpful Tip:

It is recommended that conferences are planned at least one year advance. Due to their size, conventions and city-wide conventions often require at least a five-year window.

| 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 | | |

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|--|-------|--------------|-------------------------------------|--------|---|
| 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 | | |

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|--|-------|--------------|---|--------|--|
| 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 | | | 1 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. |