

Planning a conference requires a lot of work and responsibility. It's also a great way to get involved with your organization, meet new people, and produce an event that will provide valuable information to your attendees. This timeline is a basic outline of planning a conference, but every event has its own personality. Think about past events and be open to making updates and trying new ways to get attendees talking and learning.

**Attendees will remember the education, keynote speakers, and new friends much more than the food or the décor in the meeting room.** Put the focus on the education and trust the venue staff, suppliers, and volunteers to do their jobs.

### 18 months prior to conference

- Select a conference committee. Consider creating two subgroups – one for logistics (room setups and catering), and a separate group for programming (proposal review and selection, speaker management). Assign an associate chair to each committee that works with the conference chair.
- Determine the process for documenting decisions made and information shared with the venue, suppliers, and committee members. This can be done using a shared Google folder or Dropbox folder, or through a project management tool (for examples, see <http://www.digitaltrends.com/computing/top-five-free-project-management-tools/>) All decisions must be documented in writing. If decisions are made during conference calls or meetings, assign someone to take notes and share them immediately with the meeting's participants.
- Create a list of three to five potential conference sites.
- Select preferred and alternate dates for the conference.
- Submit Request for Proposal to each of the potential meeting sites. Proposals should be returned from the venue within 4 weeks. (see RFP template).

### 17 months prior to conference

- Review proposals from potential sites and select one.
- Negotiate terms and sign contract with the venue. Submit the organization's proof of tax exemption with the signed contract.
- Set registration fees and determine if honoraria will be provided to keynote speakers.
- Choose a registration platform (for some examples, see <http://www.capterra.com/registration-software/>)
- Create a conference website or update an existing one with details about the dates and location. Choose a mass email provider or update an existing relationship (for some examples, see <http://www.pcmag.com/article2/0,2817,2453354,00.asp>).
- Determine the format for promoting session information (online only or printed program).
- Prepare a realistic budget based on the signed venue contract and fees for registration, website, and email services.

### 13 months prior to conference

- Set the conference theme and write the call for proposals.
- Prepare proposal submission form on paper or digitally through Google Forms (or a similar platform).

### 12 months prior to conference

- Distribute a paper version of the call for proposals at the current conference.
- Create a list of potential keynote speakers and begin sending invitations.

### 10 months prior to conference

- Deadline for proposals to be received by review committee.
- Determine review process and criteria for scoring proposals.

### 9 months prior to conference

- Review proposals and select sessions. Consider soliciting sessions for under-represented topics.
- Send accept and decline letters to all proposers.
- Begin promoting the conference theme, location, and registration rates.
- Open registration and housing reservations to attendees.
- Arrange for CEU credits.

### 6 months prior to conference

- Continue promoting the conference through email and a conference website. Add a sample letter for teachers to share with principals to secure funding and release time to attend the conference.
- Determine after-hours activities (receptions, off-site events, tours). Hire entertainment or plan for tickets or reservations.
- Make contact with the venue conference service manager (CSM) assigned to the event if he/she has not been in touch.
- Begin tracking registration and sleeping room reservations every week. Compare both with information tracked from the previous conferences to be sure that registration and venue reservations are consistent with previous meetings. Share information about registration pickup with the venue CSM. If venue reservations are not tracking with registration the venue CSM can offer suggestions for promoting the room block.
- Create a registration spreadsheet, making note of total registrations sold each week.
- Create a housing spreadsheet, making note of total rooms sold each week.

### 5 months prior to conference

- Continue promoting the conference by posting updates to the conference website and through social media. Add video or audio clips from leaders or former attendees. Post testimonials from past attendees. Consider adding pre-meeting content to the website that demonstrates the quality of education to be provided.

### 4 months prior to conference

- Track registration from speakers and send personalized messages to those who have not registered or reserved a venue room.
- Begin a registration spreadsheet, making note of total registrations sold each week.

### 3 months prior to conference

- Prepare a request for proposal for the audio visual provider. Usually the venue's audio visual provider is the simplest and cheapest option for a small meeting. Share a complete conference schedule with the AV sales staff and ask them to provide the price to set each meeting room with an LCD projector and screen. Provide microphones for rooms that seat more than 100 people. If the original proposal is over budget, work with the provider to find ways to cut costs (using smaller LCD projectors or placing them in just a few rooms).
- Begin sending email updates to speakers, with tips for a good presentation, reminders about registration and housing, and information about room setups and AV provided.
- Begin preparation of the final Program. Determine a final print date if the book is being printed and shared at the conference. Set a deadline for posting it online.
- Design meal tickets (if necessary) and name badges.

### 2 months prior to conference

- Purchase supplies (badge paper and holders, ribbons, attendee folders, etc.)
- Prepare scripts and special seating diagrams for general sessions and meal functions.
- Make final decisions on AV needs in session rooms and general sessions. Sign contracts with AV provider, if necessary.
- Send preliminary menus to venue CSM and discuss any changes or special requests that may need to be arranged with the venue chef.
- Prepare evaluation forms for conference
- Send reminders to speakers of date, time, and room assignment
- Check number of sleeping rooms sold again and compare to registration numbers. Stay in contact with the venue CSM as the reservation deadline approaches (usually 3-4 weeks before the event) to be sure the group has sold the number of sleeping rooms required by the contract.

### 1 month prior to conference

- Check sleeping rooms sold with the venue CSM.
- Prepare a preliminary catering menu. Determine total cost for the event with service charge included (see catering worksheet). Send to venue CSM. If catering costs do not fit budget numbers, discuss the budget with the CSM and ask for ways to reduce costs (eliminating salad from a lunch menu, for example).
- Send final email promotion for conference registration. If there will be onsite registration, share the location and hours for the registration counter.

### 3 weeks prior to conference

- Create a list of signs to be printed. Remember to include signs directing attendees to registration and hard-to-find meeting rooms and sponsor recognition. Most hotels will not allow groups to hang signs directly on walls, so remember to leave time in the schedule for printing.
- Submit convention specifications document and event resume and share with venue CSM (see examples).
- Prepare a post-event survey that will be emailed to conference attendees after the conference. Use a Google Form or an online survey tool (for examples, see <http://www.wordstream.com/blog/ws/2014/11/10/best-online-survey-tools>).

### 1 week prior to conference

- Confirm AV equipment for all sessions with the venue.
- Check venue banquet event orders (BEO) with the convention specifications document submitted. Check each document for all room setup requirements, food and beverage requests, and audio visual notes. Make any changes or edits and returned signed copies to the venue.
- Prepare registration packets and print badges.
- Ship materials to the venue.

### 3 days prior to conference

- Share final catering guarantees to venue.
- Prepare onsite “binder” of all contracts, BEOs, AV requests, special needs from attendees, and contact information.

### 1 day prior to conference

- Conduct a preconference meeting with venue staff, including individuals responsible for room setup, catering, and AV. Get contact information for all of these key venue and supplier staff members. Discuss emergency procedures with the venue. Check catering menus and room sets again.
- Walk the meeting space with conference volunteers, noting locations of the restrooms, emergency exits, and telephones for contacting venue staff.
- Walk the area around the venue taking note of restaurants and attractions that might be of interest to attendees.
- Set directional signs and prepare registration area.
- If the conference begins with a general session, check general session meeting room to be sure the seating and AV are set correctly.
- Pick up cash advance from hotel staff for registration. Ask if cash receipts from registration can be applied directly to the conference master account. Retrieve keys for conference staff office.

### During the conference

- Relax! You've done everything you could do in advance to make the event a success.
- Meet with venue CSM daily to discuss progress of the conference and to review catering bills. Review room sets, catering, and AV for the next day.

### After the conference

- Send letters of appreciation to speakers and volunteers.
- Email post-event survey to conference attendees.
- Review invoices from the venue. If a daily bill check was done during the conference the final invoice should not have items to dispute. Make note of any fees that do not correspond with actual services provided or fees for service that was substandard. If there are items on the invoice that are in dispute, pay the amount not challenged and submit a cover letter outlining the reason for nonpayment of disputed items. The venue will respond by either removing the charge or explaining why the charge will stand. Submit final payment.
- Write a post-event report. Include registration and housing spreadsheets, BEOs, final invoices, and notes about successes and challenges. Share with chair of the next conference and organization board members.