

List developed by Jane Terpstra

Conference Planning Checklist

12 Months to Conference

- Debrief and decide on possible improvements to the schedule, presentation types and logistics for next year's conference.
- Continue negotiations to confirm keynote speakers and negotiate via email or phone to hone in on the exact titles, discussion descriptions and brief bios.
- Ensure the resource library is updated with additional materials (videos, proceedings papers, handouts, slides) from all speakers.
- Scan other conferences' websites for new presentation formats and event ideas.
- Ask the advisory group members for suggestions for next year's keynote speakers.
- Refine the conference schedule, presentation types, and assign tentative locations for events.
- Investigate possible keynote speakers (watch videos of past presentations and/or transcripts, interviews, and other examples of these speaker's topics and delivery style).
- Work with the division's graphic designers on a visual for the conference web banner that will carry through on all of the print pieces.
- Email the top two keynote speaker candidates to invite them to speak, giving them the details of dates, place and compensation.
- Develop content for the conference website to announce the next conference and call-for-proposals.
- Send planning committee members data on registrations and the compiled results from the conference evaluation and virtual conference evaluation for their review prior to the planning meeting.
- Develop content for the conference call-for-proposals and ensure it is printed and distributed prior to Thanksgiving.
- Hold a teleconference to discuss changes and solicit ideas for the next conference from the fall planning committee.
- Review and update/revise the online proposal submission form.

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9 Months to Conference

- Confirm planning committee members' participation in proposal reviews and have them hold dates for the reviews.
- Update, test and refine the online proposal review and scoring form.
- Encourage proposal submissions by taking one (or both) of the following actions:
 - Announce on LinkedIn Groups and other social media forums; and
 - Send requests to leaders and organizations in the field, etc.
- Assign proposal reviews and send them to pre-determined reviewers.
- Ensure the review process for the annual awards is underway and participate in the review of proposals.
- Assign staff to participate in making final determinations of proposals accepted.



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6 Months to Conference

- Complete the final conference schedule with room assignments for all presentations.
- Monitor presenter confirmations and replace those who have declined with alternate presenters.
- Work with the keynote speakers to select topics and potential moderators and panelists for the conference forums. The keynoters generally participate in a forum as part of their obligation, so the topics generally stem from their areas of expertise.
- Begin inviting the moderators and expert panelists for the forums.
- Work with the keynoters and moderators to suggest ideas for the framework/flow of the forums and determine topic questions to be addressed by each of the panelists.
- Create content for the conference program to be distributed in approximately five months prior to the conference.
- Work with marketing staff to expand marketing of the conference for increased registrations (purchase additional mailing lists, use LinkedIn and other social media marketing and create a marketing plan to increase on-site and virtual participation).
- Confirm streaming services during the conference and select the sessions to be streamed.
- Confirm registration services for the conference.
- Ensure the conference program is distributed about five months before the conference and that the conference website provides details about registration.
- Create a mobile-enhanced program and tool for mobile session evaluations (you can build this using the MyAgenda tool).
- Begin tracking the weekly conference registrations and virtual registrations to compare with previous years.
- Begin building the session facilitator and virtual moderator schedule and email a draft to planning committee members to confirm their assignments.
- As needed, solicit divisional and campus volunteers to complete the conference facilitation and virtual moderation schedule and confirm their assignments.
- Invite committee members and/or campus administrators to introduce keynote speakers and prepare draft introductions from which they can work.

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Conference Planning Checklist

3 Months to Conference

- Continue to make adjustments to the schedule, as needed.
- Continue to work with marketing staff to expand marketing of the conference for increased registrations.
- Continue to track and graph registration data.
- Create content for the conference handbook.
- If campus funding is available, determine scholarship recipients and inform them of their awards.
- Select promotional giveaways for the conference (portfolios, pens, tote bags, etc.) and for the exhibit hall booth; ensure these are ordered.
- Ensure the framed and engraved awards for the recipients are ordered.
- Test/refine the mobile version of the program and mobile session evaluations.
- Create the physical and virtual conference evaluations.
- Create and prepare paper session evaluation forms, if needed.
- Ensure conference signs, banners and special exhibits are prepared.
- Ensure exhibit booth back-drop posters and handouts are prepared.
- Ensure there's adequate staffing for the information desk and to handle signage changes, exhibit hall check-in and directions for attendees as the conference progresses.
- Ensure the conference handbooks and promotional giveaways are delivered and that staff are ready to handle conference registration services.
- Ensure the exhibit booth and conference items are packed and delivered to the conference venue.
- Confirm whether marketing will provide a photographer to take promotional photos.

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During/After the Conference

- Assist in setting up for the conference the day before the event.
- Greet each of the keynote speakers and help them get set up for their addresses.
- Greet the forum moderators and panelists and help them get set up for their panel discussions.
- Present the conference welcome, introduction to the conference session, award introductions and conference closing.
- If time permits, participate in a special event for certificate enrollees and alumni.
- Attend/visit sessions during the conference, talk with attendees and presenters, visit with the exhibitors and work at the information desk to assess the conference, resolve issues and note changes needed for future years.
- After the conference, send thank-you messages to those who assisted during the conference, send evaluation results to the speakers/presenters and compile the conference evaluation and virtual evaluation results.
- List suggested changes for the following year's conference.

