

CONFERENCE CHECKLIST

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Listed below are the areas which you need to consider when organising a conference.

Planning

- Introduction of the people involved in the conference and the roles they are to play
- Clarify the aims and objectives of the conference
- Establish how the project has already progressed
- Draw up an activity schedule to include all tasks to be undertaken by whom, and provide timescales
- Produce events schedule which outlines the programme and all arrangements to be booked
- Development of the conference theme and programme
- Arrange regular meetings with the planning team and produce progress reports

Accounts

- Preparation of conference budget.
- Set appropriate delegate fees, sponsorship / exhibitor rates.
- Negotiation of fees and costs with suppliers.
- Collection of registration fees, issue invoices / receipts, chase non-payers.
- Payment of suppliers.
- Preparation of final set of accounts.

Conference Programme

- Set objectives so your speakers know what you are aiming to achieve and delegate expectations are met
- Prepare content and timings for conference programme
- Ensure you book a venue which can provide all the necessary meeting rooms and equipment to accommodate the conference programme
- Draw up workshop / session schedule
- Create time to visit the exhibition if included as part of programme

Venue and Accommodation

- Research suitable venues for the conference and accommodation for delegates if required
- Confirmation and booking of venue
- Confirmation of accommodation or provisional hold of hotel allocations
- Liaison with venue for room set ups and layout; catering numbers, menus and timings; equipment required and signage
- Liaison with accommodation providers on latest booking situation taking note of any release dates.
- Supply venue with events schedule
- Supply venue with audio visual production schedule
- Supply venue with rooming lists

Social Programme

- Prepare suitable programme of social activities for delegates and partners to include drinks receptions, conference dinners, excursions, pre and post conference programme
- Recommend and book appropriate venues
- Confirm all arrangements including menus, drinks and entertainment to venue
- Prepare table plans and tickets for events
- Book coaches and taxis

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Meet and Greet

- Provide meet and greet service at airport, train and coach stations
- Provide hospitality desks at airports and stations
- Produce file of useful tourist and travel information for delegates
- Arrange courtesy transport to and from the conference venue / hotels

Transport Management

- Arrange and book transport between airports, stations, event, accommodation and social events where required
- Liaison with transport company on appropriate timings, routes and pick up points
- Produce transport schedule / manifest
- Schedule for pick-up points that can be distributed and displayed for delegates
- Signage for coaches

Keynote Speakers / Presenters / Workshop Facilitators

- Invitation of speakers
- Confirm speakers together with objectives for conference
- Request speaker bio, summary of speech and AV requirements
- Co-ordinate contents of speakers presentations
- Book audio-visual requirements
- Check all speakers have registered
- Arrange travel, catering and accommodation for speakers
- Produce speaker material for delegate packs
- Rehearsals and Chairman's briefings
- Produce speaker evaluation forms

Sessions / Workshops Call for Papers

- Decide on session topics
- Announce call for papers and set deadline for receipt
- Provide format for paper and abstract submission
- Confirm / reject papers submitted. Ask presenters to register
- Plot programme including timings
- Confirm AV requirements with presenters
- Produce book of abstracts
- Book poster displays
- Produce session / workshop evaluation forms

Sessions / Workshops

- Decide on topics and invite presenters. Provide objectives of session.
- Decide if delegates need to register in advance to attend sessions
- Invitation of presenters
- Confirm presenters request summary of workshop and AV requirements
- Book audio-visual requirements
- Check all speakers have presenters have registered
- Arrange any travel, catering and accommodation
- Appoint facilitators to chair sessions
- Produce session descriptions for delegate packs
- Produce tickets for workshops and sign up sheets

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Audio Visual, Production and Staging

- Decide on what equipment is required for the production and staging of the conference book and arrange as necessary. This includes the following:
 - Set, screen, staging, lectern
 - Projection equipment
 - Audio
 - Lighting
 - Any other visual aids
- Once AV requirements have been identified draw up an AV production schedule

Delegate Registration

- Set up online registration, produce booking form
- Set up dedicated phone lines and e-mail addresses
- Send out registration details and handle delegate enquires
- Acknowledge receipt of booking forms
- Register delegate details onto database, collection of registration fees, issuing invoices / VAT receipts.
- Send out confirmation of booking together with joining instructions, location maps and directions to the conference venue and hotels, parking details and any other relevant information
- Production of name badges
- Production of delegate attendee lists
- Update database with no shows and substitute delegate details in order to produce final attendees' report.
- Reconciliation of payments received

Invitation of Delegates (For meetings where specific attendees are invited)

- Diary date call or email and confirmation of attendees name
 - Send out invitation and related documentation, for example fax back forms
 - Follow up calls to chase up non-responders
 - Acknowledgement of receipt of additional attendees
 - Call to confirm final number of attendees 1 week prior to event
- Reports produced of attendees and non-attendees through out invitation process

Delegate Information

- Produce all necessary information for the conference website
- Produce invitation / brochure, registration forms and accompanying letter of invitation.
- Information for delegates such as maps, travel information, tourist information, shopping and restaurant guides.
- Produce delegate information packs / bags including contents and questionnaires.
- Conference proceedings.
- Book of abstracts.
- Delegate attendee list with contact details
- Certificate of attendance.

Delegate Requirements

- Liaison with all venues regarding arrangements to be made for delegates, conference facilities, accommodation, catering, luggage, check-in, information desks, security, first aid and parking etc.
- Assist with travel arrangements.
- Corporate gifts / give ways for delegates.

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Provision of all Necessary Equipment

- Computers and printers with Internet access
- Posters and exhibition boards.
- Photocopiers
- Faxes
- Conference phone lines
- Registration desks

Marketing and PR

A marketing and PR plan will need to consider the following:

- Sponsorship:* Draw up sponsors proposal to identify the ways in which they will benefit from supporting the event
- Exhibitors:* Produce exhibitor information pack in order to sell stand space at the conference. Co-ordinate the organisation of exhibitors. Prepare exhibitors' information and site plan.
- Promotion of the Conference:* Identify ways of promoting the conference via various channels; websites, mailing lists, promotional literature, associations, societies and other organisations.
- PR Campaign:* Draw up a media action plan together with timescales. Identify appropriate features, listings in trade and other related press. Submit releases including details on the conference and contact information.
- Advertising:* Devise advertising plan to decide on the most effective ways of advertising the conference

Management on Site

- Final arrangement checks with venue
- Set up conference office
- Set up sponsors and exhibitors
- Set up registration and private check-in facilities
- Provide adequate signage (where permitted by the venue)
- Arrangements for telephone lines, faxes and Internet access
- Provision of photocopiers and other necessary equipment
- Supply of flowers for registration, dinner tables and conference room
- Provision of table menus, table plans and place cards.
- Provision for luggage storage, cloakroom, first aid facilities on site
- Arrange rooms for audio-visual set up and speaker rehearsals
- Briefing of chairman and speakers. Collect presentations
- Conference reporting, hearing loops and other delegate aids
- Handling question and answer sessions from the audience
- Briefing of staff and volunteers
- Provision of general information files on conference desk
- Handling of delegate queries and messages throughout the event
- Provision of secretarial and administrative assistance
- Hand out evaluation forms