

GENERAL WORK PLAN FOR PLANNING MEETINGS AND EVENTS

This general work plan is meant as a guide and should be modified for use with individual meetings and events.

12 Months Prior to Event

- ✓ Initial discussions to determine event, outcome desires, appropriate audience, number of attendees, budget and location
- ✓ Investigate and determine appropriate hotel or meeting facility for event
- ✓ Negotiate contract with hotel or meeting facility
- ✓ Develop list of speakers and alternatives
- ✓ Develop outcome measures for speakers
- ✓ Develop and mail "save the date" card
- ✓ Draft and finalize agenda
- ✓ Contact speakers
- ✓ Develop and send contracts to speakers

9 Months Prior to Event

- ✓ Develop database for registrants and speakers
- ✓ Prepare and mail promotional brochures
- ✓ Prepare confirmation notice
- ✓ Collect contracts from speakers
- ✓ Determine A/V needs of speakers

6 Months Prior to Event

- ✓ Collect materials from speakers
- ✓ Order notebooks and other supplies
- ✓ Design participant manual and other handouts
- ✓ Begin sending confirmation notices to registrants
- ✓ Reserve rooms for speakers, staff and special guests
- ✓ Order or begin preparing items for attendees' registration packets:
 1. Meeting agenda
 2. Participant roster and speaker bios
 3. Map of hotel meeting rooms
 4. Other background information for the meeting
 5. Street map of area surrounding hotel
 6. List of local restaurants and other interesting sites
 7. Pens/pencils
 8. Reimbursement form, if required

3 Months Prior to Event

- ✓ Determine layout of meeting rooms
- ✓ Determine menus and A/V needs and submit order to hotel
- ✓ Registration deadline
- ✓ Compare hotel reservations with registrations
- ✓ Develop roster of registrants

- ✓ Develop bios and roster of speakers
- ✓ Review design of participant manual
- ✓ Determine if signage, other than that the hotel may provide, will be necessary and make appropriate arrangements

2 Months Prior to Event

- ✓ Recheck registration and reservations
- ✓ Follow up with speakers to confirm needs, travel
- ✓ Final check of manual, handouts
- ✓ Send manual and handouts to printer

1 Month Prior to Event

- ✓ Develop name tags, certificates and evaluation forms
- ✓ Collect Convention & Visitors Bureau materials
- ✓ Review meeting room layout, etc. with hotel
- ✓ Make travel arrangements for speakers, staff and special guests
- ✓ Gather items and stuff attendees' registration packets
- ✓ Gather items for registration area (blank registration forms, money box, credit card machine, blank name tags, pens, etc.)

1 Week Prior to Event

- ✓ Walk through with hotel
- ✓ Provide meal guarantees to hotel
- ✓ Determine registration layout
- ✓ Double check registration and reservations
- ✓ Print name tags, certificates and participant roster

Day Prior to Event

- ✓ Deliver supplies to hotel
- ✓ Set up for registration
- ✓ Check for delivery of printed materials

Post Event – within 3 Weeks

- ✓ Summarize evaluations from participants
- ✓ Debrief with other planners of the meeting (What worked? What problems occurred? Make notes for future events/meetings.)
- ✓ Develop report for funder, if required
- ✓ Process travel reimbursements

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