



# Conference Planner's Checklist

Use this checklist as an indication of the work that needs to be done. The list is a guide only however, use it as a starting point and build. Further information is available from the Dunedin Convention Bureau.

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## Pre-Event

- Consider the dates and size of the meeting and look at an alternative date in case venue/accommodation are not available
- Commencement and closing times and time required to set up and break down
- Consider set up time if using same venue for a dinner
- Check that no other large conference or event is on in Dunedin at the same time that might impact on availability of accommodation or venue
- Check for conflicting events: public holidays, school holidays, big events or other large conference at the same time
- Consider transport - that there will be flights and transport available to get your guests or delegates to your event i.e. Cruise ship visits and availability of buses
- Decide allocation of work and additional resources required, including on-site management
- Consider the work load and decide if you need a professional conference organiser to help

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## Conference Programme

- Decide on theme and structure - what do you want to achieve
- Confirm venue requirements: see below
- Organise transport for delegates to and from venues and accommodation
- Do you need to organise airport transfers
- Arrange and book speakers and/or workshop/panel leaders and manage fees, travel, accommodation, collection of papers
- Confirm the social programme: entertainment, sightseeing, activities, team building activities
- Accompanying persons' programme including participation in conference sessions and/or social events and/or specialist activities and transport and child minding services
- Reconfirm all arrangements and numbers
- Consider what would make your conference unique to the region e.g. A Scottish heritage Haggis Ceremony

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## Venue

- Selecting appropriate meeting venue(s):
  - Location: geographical and physical factors: e.g. disability access, parking, central location, stand alone vs. hotel in house conference facility
  - Type of venue, price range, attitude and efficiency of employees
  - Catering requirements and quality of catering - consider special dietary needs
  - Ensure adequate recreation space/facilities
  - Check no reconstruction or refurbishing is underway on site/nearby or any noise issue
  - Accessibility to city, airport, charter and sightseeing services
- Meeting rooms (confirm these arrangements for each room):
  - Appropriate working space
  - Consider how you want delegates seated i.e. classroom vs. round tables etc this will determine room size
  - What requirements do you have for breakout or occasional groupings space
  - Shape and dimensions, access for set-up and breakdown, suitable lighting and controls, acoustics, air conditioning
  - Prepare diagrams showing how rooms are to be set up
  - (Examples of seating - Seating/tables set-up, theatre, boardroom, schoolroom, U-Shape, T-Shape, V-Shape, banquet/dining)
  - Do you require space for trade display?
  - Registration/secretariat tables in room or lobby
- Sleeping Rooms/Accommodation:
  - Determine expected numbers and negotiate hotel/motel package rates including VIP rooms and other specialist requirements, e.g. wheelchair access
  - Confirm agreed policies on early/late arrivals and departures, accompanying persons (including child rates), and payment for "no-shows"
- Signage requirements: venue identification, room allocation, services directions - toilets, conference programme and timetable, trade exhibition layout (if applicable), sponsors' signs

## ○ Technical and equipment requirements:

- Staging, display screens, lecterns, WiFi and internet data projector, DVD, projector trolleys, projection screens, laser pointers and remote controls, extension cords, extra lenses and bulbs, sufficient power supply and accessible power outlets, special lighting, microphones - hand held and lapel, other audio equipment, video cameras
- Access to technicians on site and backups in the case of technical problems

## ○ Other site management:

- Room allocations and requirements - media, sponsors, trade exhibitors, VIPs and national bodies, access - wheelchair, vehicular, decor - banners, signs
- Trade exhibition liaison, equipment storage and delivery, timing for conference set-up and breakdown
- Venue cleanliness, security, parking, visitor information service
- Gala dinner venue how much decorating is required

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## Finance/Accounting, Attendance & Admission

- Prepare the budget:
- Profit objectives - overall and for individual events; Main programme budget, entertainment/events budgets, exhibition budget; Cash flow
- Set registration fees and payment policy; fees for special events, cancellations/refunds policy
- Prepare a sponsorship guide and approach possible sponsors. Sponsorship may include: naming rights to the conference and/or to plenary sessions, workshops, exhibition, travel to and from the conference destination, advertising on conference accessories (satchels, pens, name tags), functions
- Record-keeping requirements: decide on computer, accounting programme, and collect attendance information: - Attendee categories with appropriate fees records, attendee card files or forms, ticketing by day, event
- Revenue administration: charges to delegates, sponsors, exhibitors
- Expenses administration: payment of accounts

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## Secretariat and On-Site Management

- Location and fit-out of secretariat office: furniture (special needs?), office machines and supplies, housekeeping supplies, storage facilities, radiotelephones for organising staff, organisational notice board - arrivals and departures, tour programmes, last minute changes
- Communications - for secretariat, delegates and media: computer links (including e-mail) and printers, telephones, photocopying services
- Stationery: letterhead paper, printed envelopes, folders, notepads, message pads, pens, staplers, scissors, tape, storage cartons, registration forms, personnel badges, tool kit and safety kit
- Location and set-up details: furniture and equipment
- Funds control: credit card facilities

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## And so, your conference has ended.

- Everyone has had a great time, and has been very generous with their compliments and journeyed home leaving you to put up your feet. Before you do that, do not forget that there are still some things to tidy up:
- Conduct a survey and get accurate feedback on the event and speakers from delegates
- Send acknowledgements and thanks to speakers, suppliers, venues
- Reconcile accounts and prepare balance sheet.
- Write a report. This will be a valuable resource for the company, association and future organising committees