REGIONAL CONFERENCE GUIDE

PART 1: PRE-CONFERENCE PLANNING

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There are various pieces that go into planning your conference. As with any project, it’s important to start by establishing a timeline for when those different pieces will need to get done. Setting up a timeline for planning and executing your meeting will help you determine what tasks to distribute to your various planning committees and when those tasks will need to be accomplished. Your timeline will also help you identify planning milestones and help you track your progress against them.

Utilize this guide to help you stay on track as you plan your event and direct your team during the planning process. If you miss an item or would like to move an item either earlier or later, please do! This is purely a guide for you to ultimately use in your own way.

Planning a large event is a huge undertaking whether you are a team of 5 or one. This guide will help you keep you organized and all the moving pieces straight. Take advantage of the templates to help you save time and energy during the planning process.
EIGHTEEN MONTHS OUT

While it may seem like your conference is far in the future, many of the major planning milestones should ideally take place in the time between eighteen and twelve months out from your event. Completing these important items will help you lay a strong foundation for a successful conference and help you to stay on track with your event and planning timeline.

Logistics

START YOUR HOTEL SITE SELECTION

☐ Outline site selection and requirements.
  ☐ Consider reviewing previous conference schedules and dates to avoid conflicting holidays or other conferences.
  ☐ Conduct RFP process to include dates, location/city, room rate range, program space and needed concessions.
  ☐ Schedule and conduct a site visit to walk and assess the space.
  ☐ See Site Visit Intake Form

☐ Determine your choice location and begin your contract negotiations.

Marketing & Communications

CREATE YOUR CONFERENCE BRANDING

☐ Finalize your conference name.
☐ Develop your conference logo design.
☐ Determine your conference tagline.
☐ Choose your conference branding colors, fonts etc.

Business Partners

START TO OUTLINE YOUR PARTNER PROSPECTUS

☐ Outline sponsor packages and inclusions.
Outline exhibit booth inclusions.
Plan your exhibit space.
- How many exhibitors would you like to have?
- Do you need different sized areas for sponsors?
- Will exhibitors need access to power?
Brainstorm other partner marketing options (Ads, sponsored breaks, etc.).

Programing

BASIC SCHEDULE AND SPACE DETERMINATIONS
- Layout a basic programming schedule and insure you’ve negotiated all the needed space. Be sure to consider:
  - Registration Area
  - General Session Area
  - Breakout Session Rooms
  - Meals and Breaks
  - Reception Areas
- Start drafting your for Call for Proposals.

Finance

CREATE YOUR CONFERENCE BUDGET
- Determine your conference budget by reference to previous years and current trends for conferences.
  - Plan for including taxes and service charges if applicable.
  - See Profit and Loss Spreadsheet Template.
Although your conference is a year away, a lot of the major planning milestones should be in motion during twelve to nine months away from the event. This time period is the ideal time to complete your hotel contracts, finalize your conference branding and ensure you are setting yourself and your region up for making a profit at your event.

Logistics

FINALIZE YOUR VENUE AND TRACKING

☐ Finalize your conference dates.
☐ Sign and execute the hotel contract.
☐ Review hotel logistics including the schedule of events, pre-con/post-con meetings, and daily and final billing.
☐ Update your planning calendar with deadlines and dates per the contract.
☐ Set up room block tracker and monitor it monthly for attrition.
☐ Notify the team of deadlines and expectations.
☐ Send introductory emails to hotel team:
  o Banquets
  o Convention services
  o Sales
  o Audio-visual
  o Exhibits
☐ Coordinate with hotel meeting planner on:
  o Menu selections
  o Meeting room set-ups
  o Audio-visual equipment selection (if using in house AV services)
  o Vendor selection and facilitation (exhibit, AV, signage and general vendor management)
☐ Identify your onsite initial set-up.
Marketing & Communications

DEVELOP YOUR COMMUNICATIONS PLAN
☐ Develop your communication plan for emails, social media, website postings and other communications.
  o Create a conference hashtag for the event.
  o See Planning Calendar Template
☐ Use your planning calendar to determine key dates for deadlines and marketing communications. Some communications to consider:
  o Save the Date
  o Call for Proposals
  o Sponsor/Exhibitor Prospectus
  o Conference Registration Open
  o Early Bird Rate Ending
  o Last Call for Registration for Attendees
  o Last Call for Registration for Sponsors & Exhibitors
  o “Know Before You Go” for Attendees, Speakers and Exhibitors

COLLECT YOUR COLLATERAL
☐ Collect marketing collateral – venue photographs, past conference photos, conference logos, and marketing photos of the area.
☐ Complete the content for your Save The Dates, include the location, dates, costs, and registration opening date if you have that available.
  o Send this information to the NAEP National Office to add it to your District/Region home page on the website. The National Office will also add your conference information to the main NAEP calendar once your dates are set.

Business Partners

FINALIZING YOUR PARTNER PROSPECTUS
☐ Wrap up what will be included with each booth by sponsorship level and plan level pricing accordingly. For example, free wi-fi for the highest partnership level.
☐ Finalize your exhibit booth inclusions. Each booth should typically include: one 6-8’ table, two chairs, and table covering.
☐ Complete your Partner Prospectus.
  o See Partner Prospectus Template.

CONTRACTING WITH AN EXHIBIT COMPANY OR DIY
☐ Contract with an exhibition company for design of exhibit hall floor plan, funds collection, equipment for Business Partners, set-up, breakdown, and pre/post package handling and delivery.
  o The contract should include that the exhibition company will work directly
with business partners for equipment rental, staging, package delivery and handling fees. Also, the exhibition company will work with venue/hotel on electrical and wi-fi requirements for business partners.

- Request a floor plan based on number of different sponsorship levels and size of booths needed based on those levels.

- DIY Exhibitors – Work with the hotel to create an exhibit floor plan and obtain information on shipping materials. Refer to above list for more considerations.

**Programing**

**COMPLETE A SITE VISIT WITH STAKEHOLDERS**

- Schedule site visit for key stakeholders/committee members.
- Assign each stakeholder an assignment during site visit.
  - Sleeping room review
  - Directional signage options
  - Activities in and around the venue
  - Meeting space details
- Review your basic schedule against the hotel specs to ensure the contracted physical space meets the needs of program development.

**FINISH YOUR CALL FOR PROPOSALS AND LAUNCH**

- Survey members for educational needs and desires.
- Finalize the process for Call for Proposals and launch.
- Determine your non-educational programming, this would include receptions, off site activities, and service projects.
- Finalize your working conference schedule.
  - See Working Schedule Template.

**Finance**

**NON-EDUCATIONAL PROGRAMMING**

- Monitor your budget and projections.
  - Ensure your hotel contract fits within your budget – don’t forget to include the service charge and taxes!
  - Monitor your speaker budget against submissions, be sure to estimate any covered travel or comped registration costs.
- Establish your final registration fees and projected registration income.
  - Business Partners
  - Sponsors
  - Exhibitors
  - Early Bird Registration
  - Regular Registration
  - Any Special Rates
NINE MONTHS OUT

Now it is time to dive in and really work out all those conference details. Between nine – six months is when many of your major conference decisions are made and much of the work is started. This is the ideal time to get your sponsors secured, finalize all your event vendors, and start working out details like set up and food options. Some might even say, this is where the fun begins!

Logistics

CONNECTING AND INITIAL DETERMINATIONS
- Confirm and finalize any vendor contracts: audio visual company, exhibition company, and registration staff.
- Conduct vendor introduction calls, contract review and establish a deadline schedule.
  - Vendors include - AV, exhibition, decorator, and registration desk, etc.
  - Calls will identify key contacts.
  - Calls should include any significant deadlines based on the program agenda.
- Begin reviewing the hotel menu selections. Keep your budget in mind.
- Begin reviewing the venue floor plans and meeting room set ups needed.
- Begin and finalize exhibit hall floor plan for distribution to business partners.

Marketing & Communications

START ADVERTISING YOUR EVENT
- Start sending out your Partner Prospectus, include the date that partner registration will open up.
  - Send an email out to your partner list announcing the conference.
  - Utilize social media and your conference hashtag.
- Create your Save the Date and send out to attendees.
- Create your online save the date event with NAEP, if you haven’t already.
**Business Partners**

**FINALIZING YOUR PARTNER ONLINE REGISTRATION**
- Set up your partner registration, this would include sponsors, exhibitors, and suppliers.
  - See Regional Event Setup Form - Suppliers
- Set-up a template for monthly/weekly registration reports for both types of registrants.
- Start soliciting business partners, sponsors and exhibitors. It is a good idea to have sponsors sign an agreement.
  - See Sponsorship Agreement Template.
- Create materials to send to partners once they are registered.
  - Event instructions, onsite contact information, storage, shipping instructions and expectations.
  - Include specific instructions on how to contact exhibition company for rentals.
- Make sure your exhibit hall floor plan is completed prior to the commitment of any business partners. If you are utilizing different areas or sized booths for sponsors, ensure your registration is limited to that number.

**Programing**

**START FILLING IN THE SCHEDULE DETAILS**
- Launch your Call for Proposals.
- Finalize your special events and activities (i.e., welcome reception).
- Research and contract events and activities outside of the venue.
- Plan your new attendee orientation.

**Finance**

**START PLUGGING IN YOUR ACTUAL NUMBERS**
- Monitor your budget and projections.
- Monitor your speaker budget against submissions, be sure to include any covered travel or comped registration costs.
- Input your business partner revenue for any registered sponsors or exhibitors.
- Input your conference expenditures.
SIX MONTHS OUT

Your event planning is in full swing! Choosing your food and beverage options, starting your conference marketing, and securing all of your keynote and breakout session speakers. The time between six and three months is when all of your conference details are starting to come together. There are many moving pieces during this time to finalize. Be sure to stay organized and utilize the checklist to stay on track.

Logistics

START IRONING OUT THE DETAILS

☐ Provide any major agenda updates to hotel, AV, and exhibition companies.
☐ Finalize your banquet event orders - review the hotel menu options, customize selections based on your budget and agenda. Be sure to consider any dietary restrictions.
☐ Begin requests for weekly sleeping room pick-ups from hotel, or request access to Passkey to view the sleeping room pick-up.
☐ Audio Visuals
  o Follow-up with audio visual company or outside vendor on your agenda.
  o The AV company will usually be responsible for Wi-Fi. Review the Wi-Fi bandwidth based on mobile app, meeting room and general session needs.
  o If an outside vendor is used for AV, setup a meet and greet between the vendor and hotel. Ensure proper insurances are provided to hotel from vendor.
☐ Start monthly check-in with the hotel Convention Services Manager (CSM) and the AV company.
  o Review meeting room set-ups and make any adjustments needed.

Marketing & Communications

SET UP YOUR ATTENDEE REGISTRATION

☐ Set up your online attendee registration with NAEP.
  o Determine your attendee pricing, early bird rate and dates, and any other information that you will need to collect during your registration process.
START BUILDING YOUR MARKETING CAMPAIGNS
☐ Develop content for communications now that you have all of the information needed.
  o Highlight your keynote speakers.
  o Feature any early bird rates and dates those are ending
  o Share any information on off site events, receptions and networking opportunities.
☐ Send emails and social media out with conference “teasers”.
☐ Start a list of any needed supplies and materials then review options and secure vendors.
☐ Interview event photographers and decide who to hire.

Business Partners

SOLICIT BUSINESS PARTNERS & SELL SPONSORSHIPS
☐ Continue to market to business partners. Feature any unsold sponsorships.
☐ Provide updates to exhibition company on bi-weekly basis.

Programing

START FILLING IN YOUR SCHEDULE AND SECURING SPEAKERS
☐ Finalize your keynote and general session speakers and complete contracts.
  o Note any payment due dates on your calendar.
☐ Start adding your breakout sessions into the schedule.
☐ Confirm with your community service project partner.
☐ Collect donations for any raffles or silent auctions.

Finance

STAY ON TRACK WITH YOUR BUDGET
☐ Update your projected food and beverage costs based on your choices.
☐ Work within your speaker budget to stay on track.
☐ Collect W9’s from speakers that you will be paying.
☐ Input your business partner revenue for any registered sponsors or exhibitors.
☐ Input your conference expenditures.
THREE MONTHS OUT

It is now the time to finalize, track registration, and stoke the fire. Many of the elements of the conference should be in motion. During this timeframe is when you will finalize most of the conference details. Filling in the remainder of the schedule, opening and tracking your attendee registration, and developing your onsite materials should all be done at this time.

Logistics

COMPLETING THE FINISHING TOUCHES

☐ Check-in with hotel team with any updates.
☐ Finalize your banquet event orders and initial counts based on hotel deadline.
☐ Place the order for directional signage and general meeting signage.
☐ Determine your room placements based on audio visual needs, projected audience size, and session set up needed.
  o To keep costs down, schedule breakout sessions in rooms that require the same AV equipment throughout the day.
☐ Track available sleeping rooms against contract.
☐ Create a packing list for onsite materials.
  o See Packing List Template

Marketing & Communications

OPEN YOUR ATTENDEE REGISTRATION

☐ Keep track of the close of the early bird rate and registration numbers weekly.
☐ Start developing your conference app, if using one.
☐ Order any needed items:
  o Sponsored or branded conference attendee bags
Business Partners

ANALYZE YOUR PARTNER REGISTRATION NUMBERS
- Assess business partner goals and needs, determine if more marketing is needed.
- Review business partner registration to send out information.

Programing

FINALIZE ALL OF YOUR SESSIONS & SCHEDULE
- Close your Call for Proposals.
- Collect speaker information, headshots, biography, session description(s), and any other information needed.
  
  o See Speaker Paperwork Template.
- Confirm the audio visual needs for each session. Be sure to consider any business partner that may be also presenting in the beginning of the session.
- Develop your post event speaker evaluation to collect data that will help to influence the planning of the next meeting.

Finance

STAY ON TRACK
- Update actual costs as numbers are available.
- Monitor your budget and projections.
ONE MONTH OUT

In the last month prior to the event you will be busy with all of the final details and last decisions that will need to be made. Now is the time to make sure you are communicating details and changes to all of your vendors and contacts. It is a good idea to send out final information to your attendees, partners, speakers and volunteers. You can see the light at the end, you’re almost done!

Logistics

FINAL STEPS FOR THE HOTEL
- Designate an onsite lead to meet with hotel, banquet and AV staff.
- Finalize meeting room set-up and AV schedule with venue.
- Arrange pre-con and post-conference meeting with hotel/venue.
  - During pre-con meeting review day-by-day set-up including room set-ups, banquet event orders, audio visual equipment, and set-up and breakdown times.
- Arrange for daily bill review with hotel/venue contact. Try to resolve any discrepancies while onsite.

OTHER CONCLUDING LOGISTICS ITEMS
- Finalize exhibit hall layout with business partners and assign all booths.
- Coordinate hotel/venue meeting with AV, exhibition, and signage companies to organize installation with each.
- Confirm logistics for any off-site activities.
- Finalize shipping schedule (signage, office materials, and registration materials).
  - To keep costs down, consult contract but most items should not arrive more than 3-days prior to the start of the conference.
- Make an inventory list of boxes being shipped.
- Consult your packing list.
- Print all materials such as badges and session materials.

Marketing & Communications

PUTTING THE FINISHING TOUCHES ON YOUR EVENT
Finalize the “Know Before You Go” communications and send these out to all registered participants.  
See “Know Before You Go” Template.

Finalize and send out final on-site schedules to your volunteers along with a contact information sheet for their reference.

Close online registration at a specified date.

Finalize any signage needed and send to printer.

Develop a shot list for all of the pictures you would like and send to the photographer.

Set up your email away message and include any frequently asked questions or links back to the information online.

Business Partners

FINALIZING YOUR PARTNERS

Finalize all of the partner registrations.

Send business partners finalized exhibit hall layout and their booth assignments.

Send the partner Know before you go and send to partner participants.

See “Know Before You Go” Template.

Programing

CHOOSE MODERATORS AND COLLECT MATERIALS

Confirm with speakers their session date, time, and any onsite instructions.

Determine your moderators for the sessions.

Prepare moderators packets or any other materials that moderators may need.

Develop session evaluations.

Create CEH Form.

Assign your conference welcome and assist with their script.

Finance

COMPLETE AND RECORD PAYMENTS

Complete any advanced payments that need to be made.

Confirm with finance department of any income invoices or bills.

Review budget and profit and loss statement and update.

Send out any open registration invoices for payment.
DURING THE CONFERENCE
MANAGING ALL THE MOVING PIECES WHILE ONSITE

Once you are onsite at the event, the excitement for your upcoming conference builds. You step through the doors and get to enjoy the calm of setting up and final preparations before the conference begins.

Staying organized and keeping track of all of your conference items is key to success onsite. Communicate with your staff and volunteers and label, label, label to allow others to find needed items easily. Have copies of the conference schedule readily available and any other frequently referenced documents.

While being onsite can be exhilarating it can also be stressful and exhausting. Ensure that you have water and snacks available and coordinate breaks with other event staff and volunteers.

Executing a large event onsite is an amazing experience, it is where you watch months of hard work come together and see all your ideas come alive. Be sure to take a few moments to appreciate this as your event unfolds.
Logistics

- Designate a coordinator for non-educational activities.
- Check and confirm the following each day:
  - Each meal function is correct according to banquet event orders.
  - Each session is properly set up (tables, chairs).
  - Each session has the correct audio visual set-up and equipment. Confirm that equipment has been tested prior to each session’s start. Check 1-2-3!
  - Check hotel reader board daily for accuracy.
- Meet daily with key hotel and meeting staff to review the day.
- Perform daily bill reviews of food and beverage and AV usage.
- If substantial amounts of registration income are received, balance cash against registration/raffle ticket records and place in safety deposit box or local bank account.
- Conduct personnel check-in to make sure all have arrived and are at assigned areas of responsibility.
- Provide personnel with items needed for daily activities, function sheets, agenda items, raffle information, general hotel information.
- Assign staff to be microphone handlers and/or to provide general information to attendees.
- Check to make sure speakers have arrived and will be at their appropriate sessions on time.
- Maintain ongoing communications with suppliers/vendors onsite and offsite.
- Obtain a daily printout of guest rooms used by the group.
- Try to take note of anything onsite that you would like to recall.
  - Things you might want to do differently next time.

SECTION 2: DURING THE CONFERENCE
- Any names of outstanding service you would like to note in the future.
- Last minute changes that might affect your bill.
- People or items you need to follow up with after the conference.

**Marketing & Communications**

- Secure and set up general signage for the conference and any signage for sessions, exhibitors and sponsors.
- Utilize social media accounts to promote and highlight specific aspects of conference programming with pictures and a conference hashtag. Encourage participation.
- Insure the photographer has a set list, schedule, and map of the space.

**Business Partners**

- Designate an onsite point of contact with exhibit booth management company.
- Greet business partners and ensure registration completion.
- Monitor the exhibit hall and business partner deliverables.

**Programming**

- Designate onsite coordinators for speakers and moderators.
- Place the correct moderator packet in each meeting room.
- Coordinate with session moderators to monitor session rooms for any issues.
- Assist speakers with any audio visual needs.

**Finance**

- Schedule time daily to check master billing account by tracking onsite registration costs and onsite fees.
- Monitor food and beverage as well audio visual additions.
- Request and review the daily no-show list.
- Before leaving the hotel reconfirm all deadlines for any outstanding payments remaining and conduct final master billing account review.

See [Organizing Onsite Management Checklist](#).
PART THREE

POST CONFERENCE
REVIEW, REFLECT, AND RELAX

You have finished the last session, packed up all the signage and checked out of the hotel. You are done... well, not quite yet!

Reviewing your event and the successes and opportunities is one of the most important parts of the conference planning process. In the period after the conference it is the perfect opportunity to collect evaluations for sessions, speakers and the event as a whole. It is important to survey both your attendees and your sponsors and exhibitors.

It is also important to conduct a debrief with the hotel, staff and keystakeholders while the experience is fresh in their minds. While you might want to kick your shoes off and put your feet up, this is the last and final step of the conference and will help insure a more successful event in the future.
SECTION 3: POST-CONFERENCE

Logistics

☐ Attend the post-conference meeting with the hotel.
  ☐ This meeting should be conducted the next business day after the conference ends. This will allow for the hotel/venue to include all conference charges; especially if the conference is held over a weekend.
  ☐ During post-conference meeting confirm that all meeting charges have been included, compare the final bill with the daily bill receipts. Make sure that all discounts and concessions have been applied.
☐ Conduct a debrief meeting with the planning group.
  ☐ Review your successes and challenges and record for future review.
☐ Prepare an email to hotel general manager acknowledging outstanding service by banquet staff and employees.
☐ Pack all conference materials and equipment for return shipment home, arrange for shipping through hotel/venue or an offsite location.
☐ Inventory all your locally rented equipment and supervise supplier pickup and return.

Marketing & Communications

☐ Send your attendee thank you email and attendee experience evaluations.
☐ Offer a Call for Programs for next year, if you wish.
☐ Engage with social media highlighting the event, repost or reply to anyone who tagged the conference.
Business Partners

☐ Send out your partner thank you email and experience evaluations.
☐ Offer pre-registration for next year at the same rate, if you wish too.

Programming

☐ Review the schedule and space for next year's event, adjust and add any needed changes.
☐ Review what was popular and what was not, outline a future potential schedule.

Finance

☐ Pay hotel final invoice after review, add to your profit and loss sheet.
☐ Pay all other final invoices, add to your profit and loss sheet.
☐ Finalize your conference profit and loss sheet.
☐ Report your final numbers to key stakeholders.