

Conference Planning

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Determine Your Audience

- ★ Number of attendees?
- ★ How many went the year before?
- ★ If possible, refer to registrations from prior year. If not, save list for future conferences.



Determine Timeline

- ★ Will it be a full day or a half-day?
- ★ Will there be one session all day or several smaller sessions?
- ★ If sessions, how long for each one? Be sure to allow enough time for each speaker, questions, and restroom breaks between each session.
- ★ Set deadline for registration cut off.
- ★ Set deadline for printing of materials to allow time for printing (registration form, goodies, program, etc.).



Solicit Volunteers

- ★ Develop committees, if necessary, to handle different areas (food, speakers, clean up, etc).
- ★ If doing by yourself, develop a “to do” list with timelines.
- ★ Contact another EA that has planned similar conferences to get ideas.
- ★ Refer to EAG web site:
<http://home.attbi.com/~executiveassistantsgroup/index.html>
- ★ “Conference Corner” for ideas on speakers, caterers, rooms, supplies.



Review Prior Conferences

- ★ Who and how many attended? Is there an attendee list?
- ★ An evaluation form will help you determine what attendees would like to hear, what they didn't like, etc.
- ★ If not, make a list of attendees and an evaluation form for current conference (this helps in planning future conferences).



Select Date and Schedule

- ★ After date is set, schedule room immediately.
- ★ Visit the room to make sure it meets your needs.
- ★ Get written confirmation of the date, time, cost, room rules, regulations, and guidelines for clean-up of the conference room.
- ★ Draft conference schedule including topics and time allotment for each.
- ★ Determine registration cut off and materials for conference due dates. Make sure there is enough time for materials to be printed.



Budget

- ★ Set a budget for speakers, food, room, etc. and put it in writing.
- ★ Determine conference fee (if any). Decide how payment will be made (field orders, warrants).
- ★ If you have a tight budget, look for free state, city, county rooms and do some of the food yourself (muffins at Costco), reduced or free speakers which are hard to find but they are out there (some listed on the EAG web site).
- ★ If you are depending on conference fees to cover the costs, make sure you have the money up-front to cover speaker costs. They usually require pre-payment or payment at the date of the conference.
- ★ Material costs, will you print or have printed?



Select Room

- ★ Make sure room is big enough for people to sit comfortably at tables or theatre style.
- ★ Make sure the parking is convenient and accessible at location.
- ★ Contact the building coordinator and set up time to go over the room logistics (will they set up or you?).
- ★ Determine the number of people you want at each table so that it is not over crowded.
- ★ Have the building coordinator give you a drawing of what the room set-up will look like.



Select Room *...continued*

- ★ Have them schedule the room out to you the afternoon prior to the conference for set up time (allow 2-3 hours). Even if they agree to set up the room, you should plan to check on it prior to the conference. Often times the set-up is not how you want it and you need time to rearrange before the conference. Make sure building staff will be on hand to assist with changes.
- ★ Have microphones, podium, PowerPoint presentations, and overheads set and ready to go for the next morning, if at all possible. Test them before the conference!



Theme

- ★ Your theme should be unique, catchy. Brainstorm titles, anything goes!
- ★ Do you want the theme to drive your classes/speakers, or do you want the classes/speakers to drive your theme? If possible, tie the titles of the speakers/classes to the theme (not all have to be tied but a few are nice).
- ★ Carry the theme/title throughout the conference. Tie the graphics and room decorations to the theme of conference.
- ★ Graphics are important. Use the same type throughout. White space is good. Don't use funky graphics or graphics that someone might take offense with.
- ★ It is fun to have goodies/toys on the tables for attendees to play with during wait times. You can order inexpensive ones from Oriental Trading Company.



Basic Forms/Materials

- ★ Registration form - Due 6 weeks prior to conference to allow for printing and mailing. Should be available electronically as well as a hard copy.
 - ▲ Conference sponsored by ??? - include logo. Overall description.
 - ▲ Time/date/place. A map would be beneficial!
 - ▲ Registration deadline.
 - ▲ Contact person. May need to include agency business identification numbers.
 - ▲ Where to send payment. What type of payment is accepted.
 - ▲ Topics - Speaker and 1-2 paragraph description of each.
 - ▲ Draft schedule with topics, speakers, and time.
 - ▲ Name of attendee, title, agency, phone number, email, and address.
 - ▲ Special needs? Is there a menu for meals?
 - ▲ List accommodations for out of town attendees.



Basic Forms/Materials *...continued*

- ★ Goodies - Due 2-3 weeks prior to conference to allow printing time. (Inexpensive to create your own notepads, magnets, etc. Call Mary for templates)
- ★ Program - Due 2 weeks prior.
 - ▲ Schedule - Time, breaks, meals, topics w/speaker, and room numbers if possible.
 - ▲ Topics - One to two paragraph description with speaker.
 - ▲ Speaker bios - short paragraphs on each one.
 - ▲ Conference sponsors.
 - ▲ A welcome page - chair of conference should write and acknowledgments should be included.
- ★ Signage.
 - ▲ Sign for entrance
 - ▲ Individual signs for each class.



Basic Forms/Materials *...continued*

- ★ Evaluation Forms - Due 1 week prior.
 - ▲ Create rating scale. ▲ Should be anonymous.
 - ▲ Identify speakers.
- ★ Informational Forms - Due 1 week prior.
 - ▲ Additional information about attendees?
- ★ Table tents - Due 1 week prior.
 - ▲ Fun for main room ▲ Rule is one tent per table
- ★ Name Badges - At least a week prior.
 - ▲ Use Word and merge into badge template. Sort the name list by last name alphabetically before you merge. Makes it easier to keep in order.
 - ▲ Design should reflect theme.
 - ▲ Print extra for unexpected attendees or names spelled incorrectly.
- ★ Labels for Material Packet - if using folders, etc.



Speakers

- ★ If you have not heard the speaker before or know anyone who has, request videotape before booking the speaker. If no videotape, ask for references and call them.
- ★ Ask another EA in the state for a reference on a speaker if you know they have booked them before.
- ★ Ask the speakers you do book for suggestions on other speakers for other topics. They often have friends in the business and will refer names.
- ★ Request they send you a bio and brief presentation description ASAP after booking.



Speakers *...continued*

- ★ Send letters to the speakers confirming date, time, cost and asking if they have any equipment or special needs immediately after you have booked them.
- ★ Find out if speakers will bring handouts or if you need to bring copies for them.
- ★ Try to schedule the speaker who you think will be the most exciting for the end of the day after lunch. This will help keep people motivated to stay until the end.



Menu-Beverages?

- ★ Breakfast? Lunch? Snacks? (You should try to have snacks in the p.m. – it helps people stay awake after lunch).
- ★ Water – will there be water all day? In my experience you cannot have too much water, make sure there is lots! Other beverages – pop, juice, coffee (have more diet than regular pop, it usually goes the fastest).
- ★ Will the food be delivered? Picked-up? Will it be buffet style or served individually?
- ★ Get in writing confirmation on what the catering service will provide, costs, delivery and pick-up times.



Supplies

- ★ Each attendee should be provided:
 - ▲ An agenda/schedule
 - ▲ An evaluation form
 - ▲ A pen or pencil
 - ▲ Paper for notes
- ★ You can put items together in a portfolio, tote bag, lunch bag, and/or present bag. Be creative!
- ★ It is nice to have candy either on the table or in the bags/portfolio. Toys are always appreciated!



Day of...

- ★ Make sure you solicit volunteers to help with day of conference registration and other activities during the day. Identify volunteers so conference attendees know where to go with questions during the day. For example, have them all wear the same shirts, have a ribbon on their name tag, or some identifying feature.
- ★ Volunteers should arrive at least 45 minutes before the conference begins. You will need the extra time to deal with last-minute issues that come up.
- ★ Have a registration table with name tags in alphabetical order.



Day of... *continued*

- ★ Have a sign-in sheet and ask people to sign-in or you can have someone put a check by their name. This helps determine how many actually came.
- ★ Greet each person with a smile and a welcome and then ask their name if you are checking off the list.
- ★ It is nice to have a few people taking pictures during the day so you can later use in a conference summary, newsletter, or post on your web site.



End of Day!

- ★ If you have prize drawings, have attendees put their name badges in a basket and pass around 20 minutes before closing. Draw names.
- ★ While drawings are taking place, ask that everyone take the time to fill out evaluation forms. Evaluations help for future planning.
- ★ If the person who draw is not there, draw another name.
- ★ Thank the conference committee and volunteers and have them come up front.
- ★ Never let conference run over schedule. People like to get out early, not late.
- ★ Clean up, make sure everything is out of the rooms!
- ★ Go to a restaurant and celebrate the success!



General Tips

- ★ When ordering food, supplies, etc., order about 5-10 extra.
- ★ Have extra name badges for fixing misspellings or substitutes.
- ★ Have extra pens, paper for attendees if they need it.
- ★ Have the conference room clearly marked so people know where they are going when they arrive.
- ★ Announce at beginning of conference where people can use the restroom, phones, leave messages.
- ★ If you have committees or people assisting you on the conference and they are responsible for bringing supplies to the conference or arriving early, send them an e-mail or phone them the day before as a reminder.



General Tips *...continued*

- ★ Make sure you have someone to introduce the speakers before each class/presentation and stay in the room to monitor any needs the speaker might have.
- ★ Keep name badge holders to use for future conferences.
- ★ You can often find companies who will donate items for giveaways.
- ★ It is best to have giveaways at the end of the day to encourage people to stay until the end.

