

Planning

Successful

Conventions

BISHOP J. W. MACKLIN/SAMPLE CHECKLIST

DEFINE MEETING/EVENT

- Goals and objectives _____

- Type of meeting (team building, planning, etc.) _____

- Decide whether formal or informal _____
- Meeting theme, if any _____

- Number of potential attendees _____

ESTABLISH BUDGET

- Master accounts _____
- Deposit account _____
- Set registration fees _____
- Expenses:
 - Printing _____
 - Speaker Honorariums _____

- Mailing & postage _____
- Fellowships _____
- Exhibit space _____
- Meals _____
- Signs & decorations _____
- Extra help _____
- Beverages & snacks _____
- Transportation _____
- Other expenses _____
- Total expenses _____

- INCOME:

- Registration fees _____
- Exhibit space rental _____
- Offerings _____
- Other financing _____
- Total income _____

SET TIME FRAME

- Length of meeting _____
- First, second and third choice meeting dates _____

ESTABLISH MEETING CONTENT

- Programs _____
- Speakers & presenters _____
- Fellowships _____
- Tentative agenda _____
- Audiovisual requirements _____
- Civic involvement _____
- Security needs _____
- Signage & decorations _____

EXHIBITS

- Allocate booth space _____
- Exhibitor policies & costs _____
- Exhibit hours _____
- Setup and teardown times _____
- Cartage firm _____
- Freight shipping & receiving guidelines for exhibitors _____
- _____
- Storage for early shipments _____
- Insurance and liability _____
- Food and beverage _____

ATTENDANCE PROMOTION

- Attendance goals _____
- Prepare meeting program and schedule _____
- Pre-meeting press releases _____
- Pre-meeting advertisements _____
- Exhibitor solicitation materials _____
- Meeting announcements _____
- Initial and follow-up mailings _____

SELECT HOTEL/VENUE

- Establish hotel/venue contact person _____
- Phone _____ Fax _____
- Email _____
- Tax-exempt certificates if applicable
- Meeting rooms
 - Sq. ft. needed _____
 - Number of rooms available _____
 - Type of rooms _____
 - Setups to be used _____
 - Audiovisual needs _____
 - Cost _____
 - Lighting _____

- Ventilation _____
- Desired amenities _____
- _____
- _____
- Access _____

- EXHIBIT SPACE

- Sq. ft. needed _____
- Number of rooms available _____
- Audiovisual needs _____
- Cost _____
- Storage _____
- Drayage _____
- Access _____
- Ventilation _____
- Ceiling height _____
- Lighting _____
- Utilities _____
- Decorating _____

Breakout rooms available _____

Specify ADA accessibility needs

- Sign language interpreter _____
- Sight-impaired accommodations _____
- Wheelchair accessibility _____

Accessibility/local transportation _____

Parking / Free or Rate: _____

Appearance

- Inside 1 2 3 4 5 (5=best)
- Outside 1 2 3 4 5

Sleeping rooms

- Rates _____
- Number available _____

Business services available (fax, voicemail, etc.)

ARRANGE HOUSING

- Room block commitments _____
- Reservations policy _____
- Date of reservation cutoff _____
- Cancellation policy _____
- Deposit policy _____
- Confirm check-in/check-out times _____
- Design reservation form _____
- Send information to conference participants _____
- Complimentary rooms _____
- VIP accommodations _____
- Hospitality suites _____
- Signature authorization _____

PUBLICITY

- Local media _____
- News releases for trade media _____
- Photographers _____
- Press room if necessary _____
- Publicity kits _____

FOOD AND BEVERAGE

- In-house or outside catering _____
- Number of banquets and location _____
- Other meals to be served _____
- Format of each meal _____
- Attendance at each meal _____
- Select menus _____
- Specify any dietary restrictions necessary _____
- _____
- Obtain menu costs _____
- Establish ticket system for meals and beverages: _____
- _____
- Additional service personnel _____
- _____
- Food and beverage for hospitality suites _____
- _____

LEISURE ACTIVITIES

- Decide on activities _____
- Reserve outside facilities _____
- Tours and sightseeing _____
- Children's activities _____
- Shopping _____

TRANSPORTATION

- Schedules for airlines, buses, etc. _____
- Airport to hotel transportation _____
- VIP transportation _____
- Transportation to functions and leisure activities: _____

SECURITY

- Determine security requirements for VIPs, exhibits, meals, and outside functions _____
- Medical emergency plan _____
- Names and phone numbers for local police, fire departments and hospitals _____

REGISTRATION

- Policies and procedures _____
- Necessary forms _____
- Registration areas _____
- Equipment, supplies and signage for registration area _____

RECEPTION

- Airport greetings _____
- VIP protocol _____
- Host committees _____
- Welcoming ceremony _____
- Nametags _____

ACCOUNTING

- Budget tracking system _____
- Master account billing _____
- Individual billing _____
- Gratuities _____
- Final billing _____
- Actual vs. budget _____