

CONFERENCE PLANNING CHECKLIST

A Year of Planning and Coordinating

Planning successful events, from a simple meeting to a several day conference, takes forethought and time and will require many months of planning and coordination. Brown Conference Services highly recommends that any event be planned at least a year in advance to ensure that resources are secured and spatial and temporal conflicts are avoided. Below is a chronological checklist put together by Brown Conference Services to plan and coordinate a successful event at Brown University. It is meant to keep both the directors of the conference and Brown Conference Services on track.

As Early As Possible (more than **1 year** in advance):

Set Dates

- Check the University Calendar for possible conflicts, such as major sporting events, conferences, holidays, and University programs (such as Thanksgiving and Easter services, Homecoming, Parents' Weekend, etc.). Consider Spring Break or early June. Dining Services, Media Services, and Facilities are incredibly busy during the months of April and May, so try to avoid these months. Keep in mind that the University prioritizes events on campus with those that align with its academic mission. The University is a year round credit-bearing institution whose classes and events take precedent.
- Contact the Scheduling Office to reserve meeting rooms, breakout rooms, workshop rooms, and/or banquet rooms. The staff at Conference Services can also recommend what spaces on campus may fit your needs best.

Program Planning and Design

- Look over and fill out the Conference Planning Worksheet (CPW).
- Bring the CPW with you to the One-Stop-Shop Open Hours staffed by Media Services, Facilities, Dining Services, and Conference Services.
- Develop educational design (participant needs, program and participant objectives, topics, speakers, and medium of instruction). Do NOT contact your speakers until you have finalized your dates and time with Conference Services.
- Determine publicity/advertising schedule and call for papers, if applicable
- Check budget and provide a cost projection sheet with bid for services needed to Conference Services. We can assist you with budget projections at Open Hours.
- If high-profile speakers are being sought, earlier contact may be initiated.

Housing

- Determine which hotel your guests will be staying during the conference. Keep in mind the distance from the hotel to campus and consider potential transportation services needed. Refer to the CPW for suggestions and descriptions of surrounding hotels and other accommodations.
- Hold a room block at the hotel and sign the contract.

9-12 Months

Registration/Website

- Create a website for your conference. Include your hotel reservation, travel information, agenda, etc.
- Build the registration website with Conference Services.
- Set-up the registration link on the conference website and include when the link will go live for registration.

Conference Meeting

- Create advertising brochures and call for papers.
- Advertise conference to potential exhibitors of interest.
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6-9 Months

Travel

- If many of your guests are traveling long distance to get to Brown, you may want to consider using a travel agency for better deals. Brown recommends Garber Travel Agency for your guests. You can set up a purchasing order through Brown Purchasing to establish a contract with Garber Travel. Speak to our staff at Conference Services or visit their website directly at www.GarberTravel.com for more information or if you have any questions.

Conference Directors:

- Begin to finalize the Program Schedule. Please allow time for breaks, set start times for plenary or introduction sessions to coincide with start time of classes, assign session chairs, update program schedule on website, request CVs from all participants.
- Determine number of brochures needed for handouts and mailing. If you are having anything shipped to Brown University for your conference, Conference Services asks all external groups unrelated to Departments at Brown to purchase mailing and storage space for their items. Conferences are responsible for transporting their items. We recommend contacting the local UPS store for this service. Their website and contact information can be found at <http://www.shipupsri.com/mailbox.htm>

Contact Speakers

- Request vita, address and phone number, social security number (for honoraria, if needed), biography and head shot photo for publicity.
- Speaker may want to make his/her own travel arrangements and submit travel expenses at a later date. If speaker wants help with travel arrangements, you may want to work through Garber Travel Agency.

4-6 Months Prior:

Conference Meeting

- Meet with Catering, Facilities, Media Services, and Conference Services to go over the final details of the CPW for menus, estimates, set up, and suggestions.
- Determine the need for conference staffing and other volunteers (shuttle drivers, registration table, ushers, and greeters at plenary sessions to hand out programs). You may want to consider hiring students to staff your events.

3-4 Months Prior:

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| <p>Conference Directors:</p> <ul style="list-style-type: none"><input type="checkbox"/> Finalize the Program Schedule. Please allow time for breaks, set start times for plenary or introduction sessions to coincide with start time of classes, assign session chairs, update program schedule on website, request CVs from all participants.<input type="checkbox"/> Draft Conference Program<input type="checkbox"/> Update Budget<input type="checkbox"/> Finalize A/V equipment needs with Media Services at Brown.<ul style="list-style-type: none"><input type="checkbox"/> Microphones: you should have one podium mic and one lapel mic. Have at least one, and preferably two audience mics for Q/A sessions. For panel sessions, determine need for tables and table mics.<input type="checkbox"/> Other AV needs: Overhead projectors (for plenary sessions, always have a backup projector since they frequently go out), LCS projectors, screens, slide projectors, video players and monitors, etc. |
| <p>Conference Announcements</p> <ul style="list-style-type: none"><input type="checkbox"/> Send mail through bulk mailroom. Contact Brown Graphic Services for this service. All you need is an excel spreadsheet of your contacts and addresses.<input type="checkbox"/> Mail brochure to each program participant and to everyone on mailing lists.<input type="checkbox"/> Consider email marketing in lieu of printed brochures. This could save you time and money. |
| <p>Registration</p> <ul style="list-style-type: none"><input type="checkbox"/> Go live for online registration and payment. Email the link to all potential participants. |
| <p>Gifts</p> <ul style="list-style-type: none"><input type="checkbox"/> Determine the types of giveaways if any, such as a tote bag imprinted with a conference logo. Shipping time may depend on what you are ordering for your guests. Please remember you are responsible for storing, mailing and transporting your shipped items to the University.<input type="checkbox"/> Order your gifts. |

2 Months Prior:

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| <p>Conference Directors:</p> <ul style="list-style-type: none"><input type="checkbox"/> Finalize guest list for special events.<input type="checkbox"/> Update Budget<input type="checkbox"/> Confirm book list for bookstore sales.<input type="checkbox"/> Confirm needs for registered exhibitors. (Electrical, table, chairs, table drapes)<input type="checkbox"/> Produce printed program and get schedule to PR.<input type="checkbox"/> Produce conference poster, if appropriate. |
| <p>Facilities</p> <ul style="list-style-type: none"><input type="checkbox"/> Schedule all table and chairs needed through Facilities by submitting online service order request forms. You may also want to consider having a backdrop behind the podium for your speakers. Also consider signposts, easels, whiteboards, etc.<input type="checkbox"/> For greenery or floral arrangements, contact Facilities as well. http://www.brown.edu/Facilities/Facilities_Management/fss.php |

Bookstore

- Notify Tova Beiser at the Brown Bookstore of major speakers for the conference. It is also helpful to send Tova a list of book titles of each of the main speakers.
- When configuring space by registration table, the bookstore usually takes 1 table, depending on size of conference to set out books.

6 Weeks Prior:

Conference Directors:

- Mail brochure to Brown Mailinglist through Graphic Services.
- Update Budget

Transportation:

- Contact Bobby McAllister from University Shuttle to set up vans and shuttles for transportation. He can be contacted at (401)228-8588 or fax (401)228-8591.

1 Month Prior:

Conference Directors:

- Finalize details and administrative responsibilities for the conference.
- Obtain local maps and information from downtown Providence Convention and Visitors Bureau.
- Confirm Catering, Facilities, and Media.
- Update Budget.
- Request Honorarium for speakers. Submit voucher for each speaker to Accounts Payable. Social Security numbers and home addresses are required. It is usually best to have Accounts Payable call you for check pick up, so that these can be given to speaker at the event.

2 Weeks Prior:

Email Letters of Confirmation

- For main speakers: email/letter should include complete, specific schedule of the speaker(s) stay at Brown University. Include flight schedule, the arrangements for pick up at the airport, when and where they will be eating each meal, the pickup time for the conference, when they are speaking, and when they will be dropped off at the airport.
- For registered participants: include map, shuttle schedule, and registration times for the participant's arrival at the conference.
- For session chairs/introducers: include time of session, CV of presenter(s)

1 Week Prior:

Create/Assemble

- Name tags
- Registration listing of participants
- Information packets:
 - Program
 - Map of Brown University
 - Providence Maps
 - Info on an institutes or centers involved and/or ongoing research and

- o scholarship pursuits at Brown University
- o Providence Visitors Guide
- o Restaurant List
- o Transportation Schedule
- o Giveaways and Goodies
- Consider sending welcome letters and agenda to the hotel for distribution upon check-in. (Note: 1-2 pages max. as most hotels will not be willing to distribute more)
- Signs for Registration, parking direction, if needed.
- Signs to guide visitors to the proper lecture halls for each session – place on easels throughout the venue.
- Update Budget

Week of Conference:

Conference Directors:

- Double check arrangements: confirm room reservations, particularly for after-hours or weekend times.
- Prior to the event, check room set up to make sure it is correct.
- You may want to consider having students post flyers and posters around campus.
- Update Budget
- Put in an announcement in the Brown Morning Mail 2-3 days prior to as well as day of the conference. The BMM can be found at <http://morningmail.brown.edu/>

Week After Conference:

Conference Directors:

- Send thank you notes to all who helped with the conference. Include thank you letters to all people and organizations (both Brown and external) that helped and/or donated money toward the conference.
- Finalize financial settlements for all speakers.

The preceding information has been provided based upon prior experiences in coordinating many conferences at Brown campus. If you find any of this information inaccurate, or believe that others may benefit from additional information, please send updates to Conference_Services@brown.edu. Your feedback is greatly appreciated. Below are some important numbers and email addresses that you may find useful.

Conference Services

Conference_Services@brown.edu
(401) 863-3100

Brown Dining Services – Catering

Laura-Lee_Radtke@brown.edu
(401) 863-2712

Department of Facilities Management

(401) 863-7800

University Scheduling Office

Scheduler@brown.edu
(401) 863-6217

Media Services

(401) 863-2197