

PROGRAM PLANNING TIME LINES

3 years

Checklist:

Solicit site proposals

Establish convention bureau contacts

Schedule site inspection trips to review and evaluate facilities

Gain board and/or site selection committee for site approval

Convention dates and site finalized

Approve and sign contracts

o Negotiate room rates

o Finalize major housing blocks

o Finalize convention center hold

Site inspection trip:

o Finalize supplemental housing

o Inspect convention facility

o Review hotel public space and rooms

o Initiate supplier contacts and negotiations

Finalize facility/hotel arrangements

Update files

o Schedule periodic review of files

1 year, 6 months

Site inspection trip:

o Ascertain city activities, information, maps, etc.

o Inspect hotel public space/rooms

o Review information about convention bureau forms/procedures, temporary help, equipment rental, media contacts, events, support literature, VIP contacts, hospital lists and contract for local labor unions (set-up and A/V)

o Shuttle buses

o Tour/special event company

o Telephone company -- message desk/phone equipment

o Decorating company -- drayage/equipment

o Entertainment

o Auto rental

o Airline (prime carrier), post-tour

- o Local host committee:
 - o Spouse's program
 - o Local VIP's
 - o Dining Guide
- o Local printer
- o Duplicating company contact
- o Banking arrangements
- o Audio/Visual supplier
- o Security firm
- o Photographer
- o Emergency services
- o Childcare
- o Local labor unions (set-up & A/V)

Develop budget

1 year, 3 months

Submit budget to Finance Committee

1 year

Get budget approved

Appoint Planning Committee

- o Set Planning Committee meeting date/location

Complete attendance promotion plans

- o Finalize marketing plan

10 months, 2 weeks

Event stationary printed

10 months, 1 week

Assemble Planning Committee material, include:

- o Schedule of events
- o Agenda
- o Synthesizes of program/course evaluations
- o Resource materials/contacts
- o Worksheets/instructions
- o Philosophy/background information/theme
- o Educational program direction/curriculum
- o Deadline/time frames

- o Committees/staff performance criteria

10 months

Convene Program Committee

- o Complete background materials

Select suppliers

- o Obtain information from show suppliers

Draft prospectus

9 months, 2 weeks

Approve and distribute program committee minutes

Set objectives

Develop program topics/formats

9 months

Topics/speakers selected

- o Setup session/speaker files (names, contact info and biographies)

- o Setup space diary

Prospectus printed and mailed

- o Setup participants files

8 months, 3 weeks

Draft invitation letters to speakers

8 months, 2 weeks

Confirmation letters sent to all speakers

8 months

Begin contract processing

Draft service manual

- o Obtain order forms from suppliers

7 months, 2 weeks

Reminder to speakers concerning dates/contracts

Mail first press release to related organizations

7 months

Mail service manual

Assign sessions rooms/advise speakers

6 months, 2 weeks

Order mailing lists and labels

Order name badge/inserts

6 months

Place advertisements in organization and industry publications

Complete social program

o Finalize banquet and hospitality arrangements

5 months, 3 weeks

Proof read and amend direct mail brochure

o Review with program chairman

Reminder to speakers about course materials

o Begin printing course materials

5 months, 2 weeks

Edit page proofs (galleys) of direct mail brochure

List on-site needs

Registration portfolio bids submitted

5 months, 1 week

Review and approve printing of brochure

Activate on-line registration system

o Hire temporary registration clerks

5 months

Distribute direct mail brochure

o Print, label and mail brochure

o Mail copies to committees, suppliers, respondents, inquiries and speakers

Register individuals

- o On-site registration form printed
- o Process on-line registrations
- o Mail confirmations

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Order convention supplies

- o Order registration portfolios and all other supplies
- o Order published materials
- o Mail request forms to speakers for required A/V equipment and housing

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4 months, 3 weeks

Commerce weekly registration reports

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4 months

Prepare initial A/V summary

Mail direct mail brochure or short reminder

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3 months

Order printed course materials

- o Inventory course materials

Send reminder to speakers concerning A/V, set-up requirements and session handouts

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2 months, 2 weeks

Mail final reminder or brochure

Mail awards banquet invitations and tickets

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2 months, 1 week

Site visit planned

- o Make appointments with contractors, facilities, etc.

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2 months

Mail special invitations

- o VIP reception
- o Speaker reception

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Process speaker/staff room reservation

Finalize on-site arrangements

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- o Appointments met
- o Review convention center schedule
- o Review hotel facility scheduling
- o Set menus, timing and entertainment
- o Finalize registration temporaries and equipment
- o Draft set-up instructions
- o Hotel schedule and instructions
- o Convention center instructions
- o Decorator instructions
- o Order A/V equipment
- o Order signs
- o Order registration personnel
- o Order flowers
- o Order A/V shuttle bus

Final program copy due
Carrier ordered and scheduled for shipping materials to site

6 weeks

Mail final instructions to facilities and suppliers
Take program copy to printer

1 month

Decide all on-site staff needs
Review final program

3 weeks

Have final program printed for distribution on-site
Receive/review supplier's versions of final instructions

2 weeks, 2 days

Pack for shipping
Carrier picks up convention materials for transportation to site

2 weeks

Process on-site staff schedule
o Finalize staff schedules
o Brief staff

5 days

- Travel to meeting destination
- Transport last minute materials

4 days

- Final walk through meeting facility to confirm details
- Set-up staff meeting office

3 days

- Start exhibit set-up

2 days

- Prepare registration materials

1 day

- Pre-conference meeting with facility staff

During the Meeting

- Conduct/manage the meeting
 - o Educational programs
 - o Extracurricular programs
 - o Social functions
 - o Business meetings
 - o Invoice reviews/gratuities paid
 - o Post-convention tour underway
 - o Review of all billings
- Conduct on-site evaluation
- Announce date and location of next meeting

1 day post

- Post-conference meeting

2 days post

Return home

2 weeks post

Send thank you letters

- o Speakers, committees and VIP letters
- o Suppliers and facility

1 month post

Evaluate meeting

- o Synthesize subjective remarks
- o Print copies of reports for new committee resource workbooks
- o Review/pay statements from facilities and suppliers

Post-convention report

- o Send registration computer print-out to participants

1 - 2 months post (maximum)

Pay all outstanding invoices and reconcile event

