



College of Continuing Education Conference Planning Task List

For additional information about conference services, program planning, and registration services contact:

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Program Planning and Design

- 1. Develop educational design (participant needs, program and participant objectives, topics, speakers, and medium of instruction.)
- 2. Select possible event dates and locations.
- 3. Identify potential sponsors that may provide funds or service.
- 4. Finalize program (speakers, poster, activities, field trips, dates, times, sponsors, and breakout room assignments).
- 5. Provide timelines and assignments for program activities, update client on progress periodically
- 6. Arrange and attend committee meetings.
- 7. Prepare meeting reports.
- 8. Provide a cost projection sheet with bid for services.

Facility

- 1. Evaluate sites/facilities for compatibility with audience and program (size of rooms, breakout rooms, registration area, exhibit space, lodging cost, room block, computer rooms, food, area attractions, costs, and handicap accessibility).
- 2. Negotiate facility contract, obtain UMN approval, and make deposit/payment guarantee.
- 3. Plan food menu and place order with caterer.
 - a. Determine type of meals and refreshments desired.
 - b. Determine a budgeted amount (per person) for meals and refreshments.
 - c. Work with on-site caterer for meal planning detail and price.
 - d. Establish meal service types (buffet, sit-down, etc.).
 - e. Decide sites for refreshment stations.
 - f. Determine meeting room requirements (i.e., water, mints, etc. & at podium).
- 4. Make final guarantee to caterer for food functions.
- 5. Confirm facility rooms are properly assigned, meal/refreshment details.

Presenters

- 1. Contact speakers to negotiate their participation fees and expenses.
- 2. Prepare speaker honoraria and expense list.
- 3. Send written confirmation of presenter role, time slot on program, and requirement for submitting papers for proceedings and handout materials.
- 4. Gather AV requirements and route to AV coordinator.
- 5. Collect biographical information and forward to client.
- 6. Collect abstracts and handout materials from speakers.
- 7. Make travel arrangements; airline tickets, room reservations or direct them to service provider.
- 8. Confirm speaker arrangements, clarify any last minute needs with speakers and facility.
- 9. Provide continuing information of event progress including registration numbers.
- 10. Obtain signatures on appropriate forms for fee payments and expense reimbursements.
- 11. Reimburse speaker expense and pay honoraria to speakers.
- 12. Secure speaker recognition and thank you items.

Budget and Finance

- 1. Develop preliminary budget of cost projections.
- 2. Set final budget including expense items and registration fees.
- 3. Establish separate event account in CCE accounting system.
- 4. Pay bills that CPE incurs for the event and others authorized by client in accordance with University policies and procedures.
- 5. Monitor and track income and expenses.
- 6. Report financial status.
- 7. After 90 days transfer the net conference financial balance to client's designated University account.
- 8. Prepare final budget report

Participant Credit

- 1. Determine if participants will receive credit, professional certification credit, CEU credit, and/or certificates of participation.
- 2. Obtain approval for credit award.
- 3. Verify completion of credit/certification requirements.
- 4. Prepare certificates.
- 5. Distribute certificates.
- 6. Report completion to certifying authority.

Exhibits/Posters

- 1. Determine number expected: exhibits _____, posters _____
- 2. Determine dates and times: exhibits _____, posters _____
- 3. Check facility for appropriate space
- 4. Recruit exhibitors/posters from client list.
 - a. via telephone
 - b. via e-mail
 - c. via promotional brochure
- 5. Select and contract with exhibition/poster service provider.
 - a. obtain bids
 - tables only
 - tables and chairs
 - table covers
 - pipe and drape
 - carpet
- 6. Design exhibit area layout
- 7. Prepare solicitation materials
- 8. Mail solicitation materials
 - bulk (allow 3 weeks for delivery)
 - first class

Exhibits/Posters (cont.)

- 9. Register exhibitors.
 - exhibit fee includes:**
 - no individual conference registration
 - one individual conference registration
 - two individual conference registrations
 - registration fee for additional staff, \$_____ amount
 - multi-booth discount, \$_____
- 10. Assign exhibitor/poster space
 - first-come, first-served
 - by location
 - by fee
- 11. Confirm exhibitor registrations.
- 12. Answer questions from potential exhibitors
- 13. Provide on-site set-up support
 - direct exhibitors to correct location
 - troubleshoot concerns and questions
- 14. Conduct exhibitor/poster evaluation
 - create evaluation
 - collect evaluations
 - score, summarize and provide data to client

Tours

- 1. Determine participant and client needs.
- 2. Develop itinerary.
- 3. Make arrangements for tour stops.
- 4. Arrange transportation.
- 5. Arrange food and beverages.
- 6. Select and contract hosts/guides.

Proceedings

- 1. Provide instructions for proceedings contribution preparation.
- 2. Receive/collect contributions.
- 3. Assemble proceedings content.
- 4. Design and layout proceedings, including cover and table of contents.
- 5. Publish proceedings.
- 6. Distribute proceedings at the event or by mail after the event, as directed by client.

Abstracts

- 1. Provide instructions for abstract contribution preparation.
- 2. Receive/collect contributions.
- 3. Assemble abstract book content.
- 4. Design and layout abstract book, including cover.
- 5. Publish abstract book.
- 6. Distribute abstract book at the event.

Sponsors/Partners

- 1. Secure sponsor/partner coordinator.
- 2. Determine levels of support needed.
- 3. Develop list of potential sponsors/partners.
- 4. Contact possible partners/sponsors.
- 5. Determine appropriate recognition.
- 6. Thank sponsor/partners.

Web Design

- 1. Identify designer for client Web site.
- 2. Contract with designer.
- 3. Link to registration site.
- 4. Maintain Web site.

Residence Hall Use

- 1. Determine residence hall need for conference.
- 2. Determine residence hall availability and costs.
- 3. Contract with U Housing for space and parking.
- 4. Include information in promotional and registration materials.
- 5. Respond to participant questions regarding residence hall and parking.
- 6. Register residence hall occupants.
- 7. Coordinate registrations with U Housing.
- 8. Authorize payment of residence hall invoice.

Transportation

- 1. Determine needs for shuttle buses and other conference needs; type of vehicle, pick-up and drop off sites, schedule, and expected numbers.
- 2. Determine bus availability.
- 3. Contract for transportation.
- 4. Include information in promotional and registration materials.
- 5. Respond to participant questions regarding transportation.
- 6. Provide exact route and timetable to transportation company.
- 7. Monitor transportation service.
- 8. Authorize payment of transportation invoice.

Audiovisual

- 1. Coordinate speaker AV needs with conference program schedule.
- 2. Order AV, sound equipment, and poster boards.
- 3. Recruit room hosts, run room lighting, operate AV equipment, etc.
- 4. Verify AV equipment set-up on-site.

Promotion and Marketing

- 1. Plan publicity and marketing strategies.
 - a. Create objectives for marketing the program.
 - b. Research markets.
 - c. Provide direction for types of promotion.
 - d. Provide a rate of return estimate.
- 2. Develop and manage mailing lists (USPS – bulk/1st class, e-mail).
- 3. Secure appropriate mailing lists.
- 4. Develop, print and mail save the date card, call for papers, posters, exhibit materials, and preliminary announcement.
- 5. Prepare magazine/newsletter/journal and e-mail announcements.
- 6. Update mailing lists for all mailings.
- 7. Draft, develop, and print promotional brochure.
- 8. Mail promotional/registration brochure.
- 9. Arrange for and submit magazine/newsletter/journal announcements.
- 10. Send promotional e-mail.
- 11. List the event on the CCE Web site and online registration site.

Participant Registration and Management

- 1. Design and develop registration form, information to be included on name tag must be determined prior to approval of registration form.
- 2. Receive registrations online, FAX, and mail on approved registration form.
- 3. Answer registration questions. Potential and registered participants are provided local and 800 telephone numbers.
- 4. Answer international participant questions about U.S. entry and visa requirements.
- 5. Create a link from CCE registration Web site to the Conference Web site.
- 6. Accept fees by check in US dollars payable to the University of Minnesota, credit card (VISA, MasterCard, American Express and Discover), CUFs number, or purchase order (bank transfers are accepted only with prior authorization by the registrar).
- 7. Bill registrations arriving without a payment (including PO) twice only. (First time on receipt of registration and second time within 30 days after the completion of the conference. After 60 days unpaid accounts receivable are turned over to the client for collection.
- 8. Mail each registrant a confirmation receipt or invoice.
- 9. Prepare list of pre-registered participants.
- 10. Provide client with participant registration information via the Web.
- 11. Provide name badges on CCE stock or stock that matches CCE stock size and weight.
- 12. Conduct on-site registration, distribute registration packets and register walk-in participants.
- 13. Determine if “balance due” participants will be admitted prior to receipt of fees.

Event Packets

- 1. Propose kind and contents of participant event packets/portfolios.
- 2. Design covers.
- 3. Collect and print materials.
- 4. Draft, develop, and print program.
- 5. Solicit vendor area attraction materials.
- 6. Collate and assemble.
 - a. Participant name badge.
 - b. Event schedule/program.
 - c. Tickets for meals.
 - d. Event tickets.
 - e. Evaluation form.
 - f. Pencil.
 - g. Notepad.

Evaluation

- 1. Draft standard, machine scored, evaluation form with comments.
- 2. Draft, customized evaluation form, as directed by client.
- 3. Prepare and print evaluation form.
- 4. Distribute and collect forms.
- 5. Summarize data.
- 6. Report analysis of data.
- 7. Prepare and print evaluation form.

Other Needs

- 1. Planning committee
 - a. Arrange and attend meetings.
 - b. Prepare reports.
- 2. Entertainment – recommend talent, negotiate and contract with providers.
- 3. Prepare meeting room and registration area signs.
- 4. Decorations – arrange for items and their installation.
- 5. Security – contract for security personnel.
- 6. Video conferencing – arrange for video conferencing support.
- 7. Obtain UMN approvals for contracts, alcoholic beverage use, etc.

