Helpful Hints in Planning a Conference or Workshop (Robert Skrocki)

1. Early Planning
   a. Start a year ahead of time for a conference, three months ahead for a workshop, at a minimum.
   b. Assemble Training Event Planning Group with Key Stakeholders who know the target audience and who have the connections to get decisions on resources made, & those with time and passion and organizational skills to do the work.
   c. Decide on whether to organize it as a “within a faith tradition or denomination” event, a “within an organization” event, or an “interfaith/ intercultural/ inter-organizational” event, each of which has advantages and disadvantages.
   d. Decide on goals/ objectives/ audience for the event

2. Mid-term planning
   a. Settle on title of Event and type of facility needed (e.g. size of room for estimated audience, one big room with round tables for discussion, workshop breakouts, audiovisual capabilities and line of sight needed, convenience of parking and public transportation access)
   b. Choose date, time, and location of event after surveying what other conflicting events might be occurring, days of week that are likely convenient for intended audience. Send out save the date notice via email lists of coalition members.
   c. Choose speaker(s) that might be of interest and bring new information and inspiration to the intended audience. Contact keynote speakers for availability on projected date and location. Confirm their speaker fees and travel expenses are within budget.
   d. Contact site and put deposit down to confirm date location and food arrangements (e.g. continental breakfast, box lunches, refreshments).
   e. Identify fiscal agent to handle monies, and empower with enough cash advance to handle deposits on site, food, etc.
   f. Determine how you want to handle registrations (online, email, mail in, etc.) Identify registrar to handle online registrations and hold registration cash.
   g. Set up format and levels of sponsorship and exhibitors, with benefits for each level, including complimentary registrations. Identify potential sponsors and exhibitors. (Hospitals, agencies, NAMI affiliates, funders, foundations, etc.)
   h. Set up rough budget with estimated expenditures for site, food, audiovisual, handouts and program book, speakers fees and travel, and revenue from fees and sponsorships/ exhibitors. Estimate reasonable fee for attendees and set up process for scholarships. Get review and approval by financially responsible coalition members.
   i. Determine types of CEUs needed for potential audience and identify coalition member to provide CEUs. The schedule and learning objectives must demonstrate the hours of direct educational contact (excludes breaks), relevance to professional clinical practice, contribution to the advancement, extension, or enhancement of professional skills/ scientific knowledge and values of the licensee, the scientific integrity of the program, the appropriateness of the teaching methods.
   j. Create text version of the conference flyer.
   k. Identify coalition member with graphics department or graphics skills and create visually appealing event flyer. For sponsors/ exhibitors, determine size and type of files for
logos, ads needed. Make sure the flyer includes the title, date, speakers and credentials, description of event, learning outcome, time, location, CEUs offered, registration instructions.

l. Contact each speaker and confirm the arrangements for their participation with a simple signed letter of agreement specifying the title and description of presentation, the anticipated audience, their name, bio to be used for publicity, address, phone, email, fax, place of conference and when to arrive, payments for travel, housing, per diem for meals, speakers fee, cancellation deadlines in the event of low registration, who to call to clarify arrangements. Confirm AV needs. Confirm handouts to be sent and copies made. Request vita and learning objectives for CEUs. W9 tax forms may be necessary. Clarify who makes travel and learning arrangements for speakers.

m. Contact potential sponsors/ exhibitors with levels of sponsorship and complimentary registrations, inclusion in program book layout, extra publicity. Some may need to be invoiced and sent the W9 forms for your fiscal agent.

n. Send out publicity many times in multiple ways.

3. One week to 3 days prior
   a. Meet with site representative to confirm room layout, meal and meal count estimates and deadlines for final meal count (add % for walk-ins), audiovisual, times for setup and takedown of exhibitor tables.
   b. Create conference packets for participants that include program book, handouts, evaluation form. Create extras for walk-ins and other registration irregularities (5-10% of registrations).
   c. Create certificates of attendance.

4. Day of event
   a. Arrive early to confirm room layout is correct, equipment correct and working, registration desk setup with handouts, cash box and receipts for walk-in registrations, name tags, markers and flip charts, etc. (1-1.5 hours beforehand depending on setup required)

5. After event
   a. Tally Evaluations
   b. Send speakers letter with evaluation totals (a requirement for CEU sponsors)
   c. Training event planning group analyzes number of attendees, evaluation results, reports to key stakeholders.
   d. Complete records on the event and file/ post for access when needed. Keep record of registrants sign in sheets for five years per CEU requirements, showing who got what CEUs. Evaluation scores