Candler School of Theology Guide for Planning a Conference

1 Year before event
1. Initiate conference with Strategic Planning Meeting – conference organizer, communications office, events office, other stakeholders in attendance
   ▪ Review past year’s evaluations (if an annual event)
   ▪ Develop event goals and objectives. Do they support Candler’s mission?
   ▪ Create stakeholder analysis including target audience and support personnel for the event
   ▪ Determine marketing strategy
   ▪ Discuss sponsors and/or partners
   ▪ Determine location
   ▪ Finalize date
   ▪ Put event on the community calendar, University calendar, and any other calendars for initial promotion
   ▪ Create rain plan if needed
   ▪ Create financial analysis of cost and benefits. Establish first draft of budget
2. Establish a timeline, working backwards from the event date listing all deliverables, start and end dates, assign task responsibilities to event stakeholders.
3. Review possible speakers, performers and/or entertainers. Select first choice and determine second choice.
4. Contact key lecturer, performers, celebrities for plenary and breakout workshops
5. Review and modify the timeline as needed
6. Create organization system for planning (notebook, files, spreadsheets, information tables, etc.)
7. Confirm sponsors/partners
8. Explore site locations – issue RFPs
9. Follow up on applications for grants, subvention funds, or other additional revenue sources

11 Months before event
1. Consult timeline – monitor and control event progress
2. Finalize budget
3. Draft event program. Review — does it support the goals and objectives of the event? Does it fit the target audience? Does it support Candler’s mission?
4. Correspond with speakers – confirm responsibilities, travel, lodging, honorarium, conference schedule, and get contract(s) signed (if applicable). Set up system for paying honorarium
5. Determine site location and negotiate and sign contact. Create Master Room blocks and set up master account for payment
6. Prepare promotional plan and logos. Begin early promotion of the event

10 - 7 Months before event
1. Consult timeline – monitor and control event progress
6 Months before Event
1. Consult timeline – monitor and control event progress
   • Review and revise budget (if needed)
2. Determine volunteer needs. Create a volunteer plan
3. Send announcements, invitations, and press releases
4. Open registration/ access system
5. Develop logistics plan and map

5-4 Months before Event
1. Consult timeline – monitor and control event progress
2. Track registration

3 Months before Event
3. Consult timeline – monitor and control event progress
4. Create volunteer database – send information email
5. Submit AV RFP
6. Check on Room Blocks and book shuttle transportation if necessary
7. Establish menus /confirm food and drink vendors
8. Create an evaluation form

1 Month before Event
1. Consult timeline – monitor and control event progress
2. Review budget – on target?
3. Prepare a calendar of deadlines and tasks for the rest of the month
4. Review entire event
5. Print name tags
6. Review menu and confirm with any changes or dietary needs
7. Assemble list of important numbers for volunteers and the event staff
8. Prepare final setup and finalize any changes
9. “Walk through” the event as a participant and determine what signage needs to be made

One or Two Weeks before the Event
1. Consult timeline – monitor and control event progress
2. Collect all event materials – assemble conference registration packets
3. On site review with volunteers. Distribute site map, list of important numbers, and answer any lingering questions
One Day before the Event or Day of

1. Set up
2. Decide if the rain plan should be implemented

Day of Event

1. Arrive early, manage event, leave late
2. Manage all logistics of event

One Day to One Week After Event

1. Plan and conduct evaluation meeting with stakeholders
2. Close out contracts. Make payments
3. Send thank you notes