
Name of Event

Event Proposed Dates

Contact Person

Department and College

Phone

E-mail

Program Planning and Design

- 1. Develop educational design (participant needs, program and participant objectives, topics, speakers, and medium of instruction.)
- 2. Determine event dates and locations.
- 3. Determine planning committee members.
 - a. Arrange and attend meetings.
 - b. Prepare reports.
- 4. Identify program speakers.
- 5. Provide timelines and assignments for program activities.

Presenters

- 1. Contact speakers to negotiate their participation fees and expenses.
- 2. Send written confirmation of presenter topic, time slot on program, and expense reimbursement details.
- 3. Gather AV requirements.
- 4. Collect biographical information.
- 5. Collect abstracts and handout materials from speakers.
- 6. Make travel arrangements: airline tickets, room reservations, or direct them to service provider.
- 7. Obtain signatures on appropriate forms for fee payments and expense reimbursements—process payments.
- 8. Secure speaker recognition and thank you items.

Abstracts

- 1. Provide instructions for abstract collection – set up Web-based tool.
- 2. Receive/collect abstracts.
- 3. Determine process for acceptance and rejection of submissions.
- 4. Assemble abstract book content.
- 5. Design and format abstract book, including cover.
- 6. Publish abstract book.
- 7. Distribute abstract book at the event.

Proceedings

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

Budget and Finance

- 1. Develop preliminary budget of cost projections.
- 2. Establish separate event account in CCE accounting system.
- 3. Pay bills that CCE incurs for the event and others authorized by client in accordance with University policies and procedures.
- 4. Monitor and track income and expenses.
- 5. Report financial status and prepare documents as needed.

Sponsors/Partners

- 1. Identify potential sponsors that may provide funds or service.
- 2. Determine levels of support needed.
- 3. Develop list of potential sponsors/partners.
- 4. Contact possible partners/sponsors.

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; prepare solicitation materials.
- 5. Select and contract with exhibition/poster service provider.
- 6. Design exhibit area layout.
- 7. Register and confirm exhibitors/posters.
- 8. Order posterboards.
- 9. Answer questions from potential exhibitors.
- 10. Assign exhibitor/poster space.
- 11. Provide on-site set-up support.
- 12. Conduct exhibitor/poster evaluation.

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 UM approval, and make deposit/payment guarantee.
- 3. Plan food menu and place order.
 - a. Determine type of meals and refreshments desired.
 - b. Determine a budget for meals and refreshments.
 - c. Work with facility for meal planning detail and price.
 - d. Determine meeting room requirements.
- 4. Make final guarantee for food functions.

Audiovisual

- 1. Coordinate speaker AV needs.
- 2. Order AV equipment.
- 3. Secure AV Technician support as needed.
- 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.
- 2. Develop, secure, and manage mailing lists (USPS – bulk/1st class, e-mail).
- 3. Develop, print, and mail save the date card, call for papers, posters, exhibit materials, and preliminary announcement, and final brochure.
- 4. Prepare and send magazine/newsletter/journal and e-mail announcements.
- 5. List the event on the CCE Web site and online registration site.

Web Design and Web-based Services

- 1. Identify design and complexity for website.
- 2. Collect and prepare materials for website.
- 3. Link to registration site.
- 4. Update website as needed.

Participant Registration and Management

- 1. Design and develop registration form.
- 2. Receive registrations online, by fax, or by mail on approved registration form.
- 3. Answer registration questions. Potential and registered participants are provided telephone numbers and e-mail addresses.
- 4. Answer international participant questions about U.S. entry and visa requirements.
- 5. Create a link from CCE registration website to the Conference website.
- 6. Accept fees by check in U.S. dollars payable to the University of Minnesota, credit card (VISA, MasterCard, American Express, and Discover), University EFS number, or purchase order (bank transfers are accepted only with prior authorization by the registrar).
- 7. Bill registrations arriving without a payment (including PO).
- 8. Mail or e-mail each registrant a confirmation receipt or invoice.
- 9. Prepare list of pre-registered participants.
- 10. Provide name badges on University of Minnesota stock or create customized name badges.

On Site

- 1. Move event materials into facility.
- 2. Check site/facility set-up (participation seating, head table, sound system, registration area, display and exhibit area, poster boards, food function areas), and review expectations with staff.
- 3. Set up registration area, including on-site registration system.
- 4. Post room and registration area signs.
- 5. Set up speaker preparation area.
- 6. Conduct on-site registration, distribute registration packets, name badges, and register walk-in participants.
- 7. Welcome participants and presenters.
- 8. Orient speakers to use of sound system, AV equipment, and lights and obtain signatures on appropriate forms for fee payments and expense reimbursements.
- 9. Answer questions and serve as troubleshooter for speakers and participants.

Event Packets

- 1. Propose format and contents of participant event packets/portfolios.
- 2. Design covers.
- 3. Collect and print materials.
- 4. Draft, develop, and print program.
- 5. Collate and assemble.
 - a. Participant name badge.
 - b. Event schedule/program.
 - c. Tickets for meals.
 - d. Evaluation form.
 - e. Notepad.
 - f. Other handouts.

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.

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 and distribute certificates.

Other Needs

- 1. Arrange for tours including itinerary, transportation, and food.
- 2. Transportation – contract for transport, develop a route and timetable.
- 3. Entertainment – recommend talent, negotiate, and contract with providers.
- 4. Decorations – arrange for items and their installation.
- 5. Security – contract for security personnel.
- 6. Obtain UM approvals for contracts, alcoholic beverage use, etc.

Evaluation

- 1. Draft standard, machine-scored evaluation form with comments, customized form, or online evaluation as directed by client.
- 2. Prepare and print evaluation form.
- 3. Distribute and collect forms.
- 4. Summarize data.

Wrap Up

- 1. Send thank-you letters to speakers, poster presenters, exhibitors, and volunteers.
- 2. Update registration list with walk-in registrants.
- 3. Arrange for and coordinate post-event evaluation meeting of planning committee.

Additional Notes