# HHS Conference Procurement and Planning Toolkit

## Procurement and Planning Requirements and Guidance for Conference Hosts

## Appendix 1: HHS Conference and Meeting Planning Checklists

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### Conference Plan Checklist

| **Conference Plan Item** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Establish budget |  |  |  |
| Provide Procurement on meeting requirements to acquire meeting planner contractor, hotel and/or vendors |  |  |  |
| Identify Project Manager Leads |  |  |  |
| Identify Planning Committee |  |  |  |
| Identify Conference Committees & Assistants |  |  |  |
| Assign roles and responsibilities |  |  |  |
| Establish Deadlines |  |  |  |
| Establish Action Plan and Timeline  |  |  |  |
| Identify conference objectives and theme |  |  |  |
| Identify modes of promotion and advertising |  |  |  |
| Identify attendees |  |  |  |
| Identify speakers |  |  |  |
| Secure facilities and rooms based on attendee and speaker count |  |  |  |
| Establish meeting format |  |  |  |
| Develop themes and tracks for each session |  |  |  |
| Design and Set session schedule and duration  |  |  |  |
| Establish strategy for popular session overflow |  |  |  |
| Develop audio visual equipment and technician lists |  |  |  |
| Develop IT equipment and technician lists |  |  |  |
| Assess computer software needs for laptops |  |  |  |
| Establish target dates for registration and sleeping room cutoffs |  |  |  |
| Establish date for hotel guarantees |  |  |  |
| Approve draft agenda |  |  |  |
| Approve draft and final convention brochure |  |  |  |
| Approve draft and final Conference Pre-Registration Website content |  |  |  |
| Establish date for pre-registration, registration and on-site registration |  |  |  |
| Design database for registration tracking |  |  |  |
| Develop webpage for registration, documents, and conference information |  |  |  |
| Determine webpage email address to receive agenda suggestions |  |  |  |
| Meet with all committee leads on a recurring basis |  |  |  |
| Discuss/resolve outstanding conference issues |  |  |  |

### Structure Checklist

| **Structure** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Determine session goals |  |  |  |
| Finalize conference theme |  |  |  |
| Finalize agenda |  |  |  |
| Examine schedule and format |  |  |  |
| Assign presenters to sessions |  |  |  |
| Nominate keynote speakers |  |  |  |
| Develop conference announcement for participants |  |  |  |
| Develop conference brochure logos, colors, art work |  |  |  |
| Conference Program Guide draft due for review |  |  |  |
| Prepare work plans and checklists for Committees, Leads |  |  |  |
| Structure goals to tracked sessions |  |  |  |
| Develop system for Logistics Committee to monitor registrations |  |  |  |
| Develop system for monitoring preregistration for tracked sessions |  |  |  |
| Identify networking opportunities, leisure events, special learning sessions |  |  |  |
| Set learning goals and milestones for presenters and speakers |  |  |  |

### Hotel Checklist

| **Hotel**  | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Site research, bidding, and selection |  |  |  |
| Site inspection |  |  |  |
| Hold pre-conference meeting with hotel and technicians |  |  |  |
| Establish agenda times for each function and rooms |  |  |  |
| Crosswalk agenda times, function, and capacities with hotel BEOs |  |  |  |
| Confirm meeting room seating arrangements |  |  |  |
| Establish break out rooms, capacity, seating configuration |  |  |  |
| Establish overflow strategy for breakout rooms |  |  |  |
| Establish meeting room for Conference Office at hotel |  |  |  |
| Establish internet cafe |  |  |  |
| Establish master account |  |  |  |
| Arrange sleeping room block |  |  |  |
| Issue guarantees and final numbers |  |  |  |
| Monitor contracts for hotel |  |  |  |
| Finalize master audio visual equipment and technician report times |  |  |  |
| Review master hotel account for sleeping rooms |  |  |  |
| Reconcile final invoices |  |  |  |

### Participants Support Checklist

| **Participants Support** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Develop communications plan for participants |  |  |  |
| Conference Pre-Registration Website Online |  |  |  |
| Mail formal invitations to attendees |  |  |  |
| Provide a list of Managers & Supervisors to Vendors |  |  |  |
| Pre-Conference Online Registration Available |  |  |  |
| Final List of Attendees Due to Vendor |  |  |  |
| Final Date for Hotel Registrations |  |  |  |
| Final Date for Pre-Conference Online Registration; Notify Attendees |  |  |  |
| Mass mailing of convention brochure |  |  |  |
| Mail invitations to speakers/VIPs |  |  |  |
| Provide registration brochure |  |  |  |
| Provide final agenda |  |  |  |
| Provide information on hotel, transportation, and activities |  |  |  |
| Develop participant master list |  |  |  |
| Generate correspondence/calls for individual problems |  |  |  |
| Print name badges |  |  |  |
| Print breakout session ID passports for admission and tracking |  |  |  |
| Match pre-conference & hotel registrations by name, business unit, date |  |  |  |
| Pre-conference Registration Report |  |  |  |
| Corrections to Pre-Conference/Hotel Registrations |  |  |  |

### Speaker Checklist

| **Speakers** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Finalize key note speakers for final agenda |  |  |  |
| Identify Instructors for breakout sessions |  |  |  |
| Finalize session speakers |  |  |  |
| Confirm audio-visual equipment needed by presenters |  |  |  |
| Arrange speakers' fees and expenses |  |  |  |
| Provide conference materials for review |  |  |  |
| Provide guidelines for presentations |  |  |  |
| Secure recorder for learning sessions |  |  |  |
| Keynote Speaker for Opening Remarks |  |  |  |
| Contract with special event speaker |  |  |  |

### Vendor Checklist

| **Vendors** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Identify types of exhibitors |  |  |  |
| Identify the number of poster board stands needed for poster sessions |  |  |  |
| Specify printing budget and vendor |  |  |  |
| Have emergency plan -- doctor, nurse, hospital contacts on hand |  |  |  |
| Accessibility backup plans and assistance sight, hearing, mobility |  |  |  |
| Finalize audiovisual equipment |  |  |  |
| Establish subcontractors for special equipment -- computers, printers |  |  |  |
| Select and procure supplies |  |  |  |
| Obtain area maps and guides |  |  |  |
| Obtain a list of restaurants, convenience store, and local retail |  |  |  |
| Obtain a list with contact information for taxi and shuttle bus service to and from airport and hotel  |  |  |  |
| Obtain a list with schedule and cost for the use of public transportation  |  |  |  |
| Signage |  |  |  |

### Materials Checklist

| **Materials** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Print final program and agenda |  |  |  |
| Assemble and reproduce background papers |  |  |  |
| Compile and reproduced list of participants/vendors/speakers |  |  |  |
| Compile list of presenters |  |  |  |
| Compile bios for main speakers |  |  |  |
| Assemble and reproduce speakers' papers |  |  |  |
| Package conference materials |  |  |  |
| Create and reproduce CDs -- learning tools |  |  |  |
| Distribute materials to participants |  |  |  |
| Conference Check-in Area Setup |  |  |  |
| Message Board Center |  |  |  |
| Delivery Conference Bags/Portfolios to Hotel |  |  |  |
| Deliver Name Badges for Attendees to Conference Check-In Area |  |  |  |
| Provide Welcome Sign at entrance of Conference area |  |  |  |
| Provide Conference Program Guides |  |  |  |
| Provide Bus Stop signs |  |  |  |
| Table Talk discussion cards |  |  |  |
| Provide United States flag for main stage |  |  |  |
| Conference Check-in Staffed  |  |  |  |

### Special Services Checklist

| **Special Services** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Schedule tours |  |  |  |
| Negotiate contracts for evening entertainment |  |  |  |
| Plan poster session on learning tools |  |  |  |
| Ensure transportation available back to campus for emergency situations |  |  |  |
| Provide Photographer with suggested formal and informal poses |  |  |  |
| Provide tape recording of key note speaker |  |  |  |
| Provide one Luggage Tag per attendee |  |  |  |
| Conference assistants communication during conference |  |  |  |

### On-site Support Checklist

| **On-Site Support** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Final Planning Meeting with Conference Assistants  |  |  |  |
| Brief session monitors on tracking attendance -- collect passports |  |  |  |
| Load presentations on laptop computers |  |  |  |
| Set up rooms for Workshop Sessions |  |  |  |
| Select and brief staffing team for registration |  |  |  |
| Provide Conference Office at meeting site with equipment/furnishings |  |  |  |
| Laptop computers with network laser printer |  |  |  |
| High-speed photocopier (collate, double-sided, stapling) |  |  |  |
| Cases of three-hole punch paper for copier |  |  |  |
| Five skirted tables, eight chairs, three trash cans |  |  |  |
| Conference Check-in Area Setup |  |  |  |
| Message Board Center Available, Centrally Located and Staffed  |  |  |  |
| Delivery Conference Bags/Portfolios to Hotel |  |  |  |
| Deliver Name Badges for Attendees to Conference Check-In Area |  |  |  |
| Provide Welcome Sign at entrance of Conference area |  |  |  |
| Provide Conference Program Guides |  |  |  |
| Attendance Tracking at Workshop Sessions |  |  |  |
| Technical Support Available for Breakout Rooms |  |  |  |
| Conference Assistants work Bus Stop Pick Up Point |  |  |  |
| Provide Bus Stop signs |  |  |  |
| Table Talk discussion cards |  |  |  |
| Select and brief staffing team on trouble-shooting |  |  |  |
| Conduct pre-conference briefing with hotel staff |  |  |  |
| Inspect facility for room set up |  |  |  |
| Deliver materials to site |  |  |  |
| Register all participants |  |  |  |
| Supervision logistics in each room and resolve problems |  |  |  |
| Distribute name badges and table placards for speakers |  |  |  |
| Collect Evaluations |  |  |  |

### Post Event Checklist

| **Post Event** | **Responsibility** | **Date** | **Notes** |
| --- | --- | --- | --- |
| Reminder email attendees completion of online Conference Evaluation |  |  |  |
| Prepare Final Attendance Report  |  |  |  |
| Review and finalize hotel bill |  |  |  |
| Deliver Breakdown of Costs document  |  |  |  |
| Provide Conference Breakdown Checklist |  |  |  |
| Draft Conference Evaluation from and post on Conference Website |  |  |  |
| Deliver Standard Operating Processes and Procedures document |  |  |  |
| Compile Standard Operating Procedures documents from Vendors |  |  |  |
| Compile evaluations |  |  |  |
| Provide a report of Conference Evaluation statistical analysis |  |  |  |
| Post conference photographs on Conference website |  |  |  |
| Write report of accomplishments |  |  |  |

### Related Information

Chapter I – HHS Conference Standard Operating Procedure

Chapter II – Conference Cost Drivers

Chapter III – Programmatic Considerations

Chapter IV – Contracting Considerations

Appendices:

* Menu of Options for HHS Conference Vehicles

Attachment:

* List of DC-Area Federal Conference Venues (Excel version)