

WORKSHEETS

2: TIMELINE – PLANNING SCHEDULE

Dates and tasks should be adjusted according to the specifics of your meeting or event.

RESEARCH AND DESIGN PHASE 36-48 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Establish conference goals and objectives.	
	2. Identify desirable months and days of weeks for conference.	
	3. Prepare preliminary conference outline to include program session blocks, social program blocks, exhibits, sleeping-room requirements, and a brief description of each.	
	4. Begin site research of cities meeting the conference criteria.	
	5. Send conference requirements to selected sites with requests for written proposals.	
	6. Obtain meeting dates and sites from other related organizations to avoid conflicts and potential tie-ins.	
	7. Review site proposals; select potential sites.	
	8. Begin site negotiations with potential cities and properties.	
	9. Conduct site visits as required.	
	10. Finalize and sign hotel contract. Add deadlines and requirement to timeline.	

PLANNING PHASE 18-24 MONTHS PRIOR		
Date Completed	Task	Assignment Person/Department/Committee
	1. Select and appoint local conference committee(s) as required.	
	2. Establish two-year marketing plan and implementation schedule. Add deadlines and requirements to timeline.	
	3. Prepare and mail letters to potential meeting sponsors requesting consideration in next year's budget.	
	4. Evaluate current and potential markets, and identify target market(s). Review, update, and obtain mailing lists based upon evaluation results (e.g., registrants, sponsors, advertisers, exhibitors).	
	5. Prepare preliminary budget categories.	
	6. Review and evaluate past, current, and potential revenue sources. Specify "needs" areas for funding requests. Match program needs to dollar needs and potential funding sources.	
	7. Prepare and mail funding request prospectus.	
	8. Review conference timeline for adjustments and updates as required. Review all tasks (internal and external requirements). Identify needs for outside consultants, and specify requirements.	
	9. Request proposals from potential consultants.	
	10. Establish conference theme and preliminary graphics.	
	11. Evaluate insurance needs and obtain appropriate policies.	