



# Solo & Small Firm Conference Bar Staff Checklist

Materials provided by:

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## **12 MONTHS IN ADVANCE (1<sup>ST</sup> EVENT)**

- Meet with sponsoring committee/section to lay out preliminary plans for the event.
- Make contacts for major sponsor(s).
- Conduct site visits to hotels/resorts
- Negotiate and sign contract with hotel/resort.

Note: It may be necessary to reserve meeting space several years in advance for very popular locations or when a large attendance is expected.

## **10 MONTHS IN ADVANCE**

- Develop and finalize conference budget
- Assist with recruiting planning committee members
- Work with chair to schedule planning committee meeting

## **9 MONTHS IN ADVANCE**

- Send meeting notices to planning committee for meeting next month.
- Contract with overflow hotels (if needed)
- Set up listserv for planning committee members to communicate via e-mail.

## **8 MONTHS IN ADVANCE**

- SASF Conference Planning Committee Meeting  
Note: Meeting packets should contain a meeting agenda, ideas that have been collected for programs, a blank program track, and copies of evaluations from prior conferences. Keynote speakers and other special speakers should be identified at the planning meeting.
- Assist chair with scheduling 2nd planning committee meeting and send notices (if applicable)

## **7 MONTHS IN ADVANCE**

- Recruit and negotiate contracts with keynote speakers and other guest speakers.
- Draft conference schedule and program plan.
- Contact prospective sponsors.
- Develop menus with hotel and negotiate pricing.
- Begin developing conference website.

## **6 MONTHS IN ADVANCE**

- Attend second planning committee meeting (If needed)
- Begin search for entertainment.
- Send notices/invitations to prospective sponsors along with conference outline.
- Contract with convention services company for pipe & draping, etc.
- Begin conference promotions in bar publications, newsletters, e-newsletters, etc.
- Launch conference website.

## **5 MONTHS IN ADVANCE**

- Send notices to prospective exhibitors.
- Make hotel reservations for staff, speakers, special guests
- Contract for computers for computer lab (if applicable).
- Contract with companies for audio/videotaping (if applicable).
- Design conference brochure.

- Begin recruiting home grown speakers for programs
- Find a sponsor for registration bags
- Send first early notice to targeted groups
- Promote and market the conference whenever possible

#### **4 MONTHS IN ADVANCE**

- Make site visit to hotel/resort to finalize details with the sales and convention services staff
- Finalize printed brochure
- Finalize arrangements for speakers, entertainment, special guests
- Promote and market the conference whenever possible

#### **3 MONTHS IN ADVANCE**

- Send notices to speakers about deadlines for bios, course materials, audio-visual needs, audio/videotaping releases
- Order or arrange for supplies of bar spirit wear to be offered for sale.
- Order supplies of badges, tickets, table tents, ribbons, etc.
- Solicit for prizes/give-a-ways
- Finalize travel plans for visiting speakers, entertainers
- Submit program agenda for MCLE approval
- Coordinate with hotel/resort on exhibit hall layout.
- Schedule meeting or conference call with planning committee for update (optional)
- Promote and market the conference whenever possible

#### **2 MONTHS IN ADVANCE**

- Send follow-up notices to prospective sponsors and exhibitors.
- Recruit moderators and make program assignments
- Confirm menus with hotel
- Confirm Internet connections or other special needs with hotel
- Send special invitation to attend to those who attended last year (if applicable)
- Send press release to legal newspapers
- Remind speakers of upcoming deadlines for course materials, audio-visual needs
- Secure ad copy from exhibitors and sponsors for Program Guide
- Follow-up on speaker releases for audio/videotaping (if applicable)
- Begin making or order signs
- Design and lay-out Program Guide for conference
- Revise budget (if necessary)
- Make staffing assignments
- Arrange for any gifts or awards needed
- Arrange for post conference online evaluation development (if applicable)
- Arrange for meeting or conference call with planning committee (optional)

#### **1 MONTH IN ADVANCE**

- Finalize meeting room locations with hotel staff
- Complete signs or place final order
- Complete Program Guide and send to printer
- Follow-up with speakers for course materials
- Compile course materials and send to printer and/or have CD-ROM produced
- Follow-up on all arrangements for Cyber Café (computer lab)
- Initiate marketing blast especially through online newsletters or e-mail campaign
- Arrange for truck or other transportation of convention materials to conference location
- Contact paid speakers and entertainers to confirm their attendance
- Set pre-convene meeting with hotel/resort

## **2 WEEKS IN ADVANCE**

- Finalize conference guides with tips to get the most from attending and send to copy center
- Gather readily available items for handouts
- Complete sponsor and exhibitor packets
- Complete name badges for exhibitors, sponsors, and attendees
- Develop notes for master of ceremonies
- Order checks from accounting for payment of speaker honorariums and fees for entertainers
- Initiate last call marketing promotion
- Send e-mail with link to course materials for registrants who purchased CD only
- Complete evaluations, exhibitor punch card, and MCLE form to send to printer
- Compile speaker packets: date, time, location, and moderator for program
- Compile moderator packets: date, time, location, speaker, and checklist for program
- Confirm audio-visual arrangements with hotel
- Schedule post conference meeting with staff
- Arrange for staff appreciation lunch

## **1 WEEK IN ADVANCE**

- Carefully review BEO (Banquet Event Orders) from hotel/resort
- Prepare for final meal guarantees
- Confirm final golf guarantees and others
- Pack items needed for transport to hotel/resort
- Stuff registration bags
- Stuff name badges with tickets
  - Tips: Use the envelope style clear badges and stuff all meal tickets inside; put name on both sides of name badge so it's always visible.
- Meet with staff working the Conference to finalize all plans

## **WEEK OF THE CONFERENCE**

- Turn in final guarantees for meals to hotel
- Oversee loading and transportation of materials to conference site
- Prepare list of attendees for distribution at the conference
- Meet with hotel staff to finalize all details of the event
- Take a deep breath and get plenty of rest

## **POST CONFERENCE**

- Send thank you letters to speakers and moderators
- Follow up to be sure speakers are reimbursed as agreed upon
- Send thank you letters and evaluations to sponsors and exhibitors
- Send a thank you note to the planning committee and special guests
- Send a thank you letter to hotel/staff. Recognize staff that went beyond the call of duty. Note troublesome areas.
- Hold post conference meeting with staff and appreciation lunch; keep good notes for next year
- Conduct online evaluations and thank registrants for attending; notify date for next year
- Compile evaluations received at conference and online
- Send evaluation results to speakers and Planning Committee
- Compile sales reports for accounting
- Start after market campaign for audio/videotape sales
- Notify companies who provided prizes with the names of the winners along with a thank you message for their contribution.
- Review final hotel bill and negotiate any discrepancies
- Begin negotiations with hotel/resort for next year's conference
- Take a deep breath, enjoy all your compliments, and get ready to go it all over again.