10 steps to planning a successful conference

By Catherine Wilson Cox, PhD, RN, CEN, CNE

Use this guide to plan large and small events.

DURING MY CAREER as director of programs for the American Association of Colleges of Nursing (AACN), my team and I planned and executed 30 national conferences with 11,500 participants who obtained over 4 million continuing nursing education (CNE) contact hours. And we did it all without a playbook to guide us.

Planning and presenting educational events can advance your career and give you the satisfaction of helping your colleagues learn. However, few resources exist to help guide you through this process. Based on my experience, whether your event is small or large, the basic steps are the same. Use these 10 steps as you plan your next (or first) event.

STEP 1 Book the location

If you're planning a large conference, you'll issue a request for proposal (RFP) to conference hotels either individually or through a conference broker several years in advance of the event. The RFP should meet both member and organizational needs and include information on meeting dates (including hotel guest room block numbers), meeting space requirements, exhibit space, and food and beverage orders. Releasing an RFP early will yield more options. And try to rotate your meeting sites; if an event is held on the east coast one year, try to offer it on the west coast the following year. If you're planning a smaller local event, book your venue at least a year in advance for the best options.

Before making your final venue choice, read online reviews and ensure that factors important to attendees—such as personal safety, dining options, physical fitness availability, and no-smoking rooms—are addressed. After you've made your selection, begin your concession negotiations. You'll want to negotiate for group rates, complimentary Wi-Fi in the sleeping rooms and function spaces, and food and beverage minimums. When negotiations are complete, secure a contract.

Even with the best intentions, unforeseen events can happen. The key is to react quickly and calmly.

STEP 2 Create a budget

Develop your budget based on previous registration numbers and then estimate the following categories: travel (both staff and speakers), catering and accommodations, audiovisual (AV) requirements, and miscellaneous expenses (for example, maintaining approved CNE provider status, using abstract management software, performing electronic conference evaluations, and running a mobile meeting application). If prior registration numbers aren't available, then an estimate may be "guesstimated" based on a needs assessment sent to potential attendees. Meeting revenue will be generated from participant registration fees; additional expenses can sometimes be slightly offset by sponsor and vendor income.

Some potential attendees may complain about high registration fees; however, AV costs can be high; food and beverage orders are costly (especially when offering healthy options); and providing Wi-Fi—if not given as an initial concession when negotiating a contract—is expensive. The key to handling complaints is to minimize their frequency by being transparent before, during, and after the event. Enforcing a cancellation policy that doesn't allow full refunds also may garner complaints. However, to cover the cost of food and beverages that have to be ordered at least a week in advance as well as the administrative expenses associated with processing a refund, you must enforce your policy. Most people will understand this when it's explained to them, so, again, the key to good customer service is transparency.

STEP 3 Build your team

Rely on organizational members to join your planning committee because they're the experts when it comes to recognizing timely topics as well as identifying the best speakers. Once the planners are identified and confirmed, create a poll to determine the best four to six dates and times to meet—either in person or through conference calls. Choose the dates and times when most members can meet; you'll probably never find times that work for everyone, but don't hesitate to ask those with conflicts to rearrange their schedules. Distribute agendas before each meeting, and circulate minutes as soon as possible after.

Conference planning takes a lot of time, so think about how you can compensate your committee members; you might want to consider waiving their registration fees or reimbursing travel and hotel expenses. If your budget can't support subsidizing conference expenses, explain this when you invite people to join the committee; remind them that participating is an opportunity to serve the profession and can help advance their careers.

STEP 4 Review past event evaluations

Before your first planning meeting, distribute these documents to the committee members:
- orientation information
- CNE conflict of interest forms
- a roster of planning members, including contact information
- an evaluation summary from past meetings
- a conference "planning shell" (an outline with suggested dates, times, and sequencing based on past experience)
- a list of themes from the previous years.

When planning an inaugural event with no available evaluation data, survey your intended audience. During the first planning meetings, and after reviewing historical data and audience surveys, generate a list of desired sessions. You'll prioritize them at subsequent meetings.

STEP 5 Brainstorm sessions and speakers

By this step, the general planning shells start to take shape, prepopulated with suggested ideas and ranked with possible speakers (for example, plan A, B, and C speakers). This format empowers committee members to invite another speaker if the first choice isn't available.

You and your team will start to flesh out topics, brainstorm catchy titles, finalize themes, and formulate descriptions so that during speaker negotiations each presenter knows what content the planners want. If you want to include poster presentations, use an abstract management system to manage the call for abstracts, track the submissions, assign the reviewers, notify the authors, format the abstract book, and allocate the rooms at the venue. These systems provide a seamless process for the event staff, presenters, and attendees. You and your committee members can review the abstracts or enlist content experts.

STEP 6 Invite speakers

Now it's time to invite speakers. Send a formal email and specify exactly what should be presented and how speakers will be compensated. Here's a sample offer:

As a not-for-profit member services association, we have a modest conference budget. However, we will waive your conference registration fee and reimburse your roundtrip coach airfare (but not seat upgrades), baggage fees, ground transportation (excluding limo or rental car), one hotel night (room and tax at the conference rate), and up to $XX against additional expenses (for example, meals).

As each speaker is confirmed, send any required CNE forms, ask for a brief biography to be used when introducing the speaker, and ascertain AV needs. Also share tips about how to engage audiences rather than "death by PowerPoint." For example, share AACN's speaker resources with your presenters (aacnnursing. org/Professional-Development/Conferences/Speaker-Resources).

STEP 7 Begin the countdown

Now that the program is in place and the speakers are locked in, finalize the agenda. When mapping out the timing of each day, remember to build in breaks, offer an opening reception if possible, and include downtime for networking (the number one reason participants attend conferences).

The next decision is how to process registrations. For example, will you require all attendees to register before the event or can they register onsite? Offering a discount for early registration serves two purposes—it may entice those with budget concerns and it can help you anticipate how much food you should order and number of supplies to have on hand. Then proceed to develop, publish, and disseminate a brochure.

As you get closer to the date, purchase a meeting app—which are available from multiple vendors—and build interactive applications to organize the event and communicate with your attendees. An app will eliminate the need for hard-copy conference items, including evaluation and CNE forms. Also, use this time to review conflicts of interest with your speakers; if any conflicts remain, don't provide CNE hours for that session.

Last, assemble moderator packets for the planning members so that they're prepared to introduce speakers and moderate sessions. These packets should include

speaker biographies, tips for facilitating sessions, and time cards to alert speakers when time is running out.

STEP 8 Attend the pre-con

You may have to travel to the venue 1 or 2 days before the event to make sure your shipments have arrived. You'll also attend the hotel pre-conference (pre-con) meeting between venue and meeting staff to review the banquet event orders (BEOs). BEOs include the food and beverage requests, AV requirements, room set-ups, event planner and venue phone numbers to use in emergencies, and any essential special accommodations (for example, attendee/speaker food allergies, vendor support, and special guests).

STEP 9 Put boots on ground

Now the fun begins. Everything you've planned finally comes to fruition, and the participants and speakers you've been corresponding with have arrived. For large events, consider hiring local hospitality workers through a convention bureau to welcome attendees, staff the registration table, and support your team.

Each day of the event will start early because you'll need to work with AV personnel to place equipment and ensure that all speaker requests are met. You won't be able to predict everything that can happen,

but you can always be prepared (take extra batteries for the slide advancers, additional laptops to replace those that don't work, printing cartridges and reams of paper for any computer stations, and several smart-phone chargers and charging stations for those who come without). Your last order of business is to verify the "no shows" and input the onsite registrations.

STEP 10 Debrief and start planning for next year

Begin debriefing onsite. Note what does and doesn't work and implement changes right then and there, if possible. Even the participants' speaker evaluations and CNE hours can be moved from a post-conference activity to an onsite process if you have a meeting app. Keep your online evaluation survey open for a month after the meeting, and then pull the results to incorporate the ratings and constructive comments in your speaker thank-you letters.

Now get some rest because in a few months, you'll start back at Step 1 to begin the process all over again. ★

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Selected reference
DeSilets LD. Taking the plunge: Things to consider when making the decision to provide a national conference. *J Contin Educ Nurs.* 2013;44(2):53-4.

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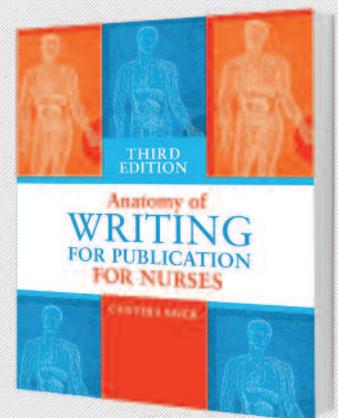215-435-1260 • tlondon@healthcommedia.com