

Suggested Timeline/Checklist for Planning a Live Conference

When we started planning the Six-State Virtual Government Information Conference in 2010, we had no checklist when – we learned as we went along! Your timeline may vary, based on whether or not your conference involves the program proposal process. By filling sessions via proposal, you'll incorporate additional tasks (create proposal form, advertise conference/proposals early on, await submissions, perform selection/notification process) that has the potential to extend the timeline by several months..

This Six-State Virtual Government Information conference (now called “Western States Government Information Virtual Conference”) is a free conference using existing resources available freely to the group, library staff able to coordinate the conference in addition to their normal work, busy days, and creativity! (**Bold** are turning points.)

Our Chronology:

1 Year before:

- Consider event and set goals
- Begin discussions; get buy-in from people willing to work on planning
- Establish leadership for conference

6-7 Months before:

- Assemble leaders to begin planning process
- Create core conference planning committee (found 12 to be good number – more ideas, more people to share load); included active regional librarians and volunteers from selective libraries
- Determine virtual software platform to be used as conference “site,” negotiate usage (may want to compare two to examine pros and cons)
- Use online meeting scheduling tool to plan across time zones and select best time for all
- Hold first meeting in selected conference site to build knowledge of platform’s abilities
 - o (hold meetings every 2-3 weeks thereafter for status updates/decisions until 2 months before conference, when meetings switch to weekly; hold all in online conference site, if possible)
- Discuss general aspects of conference including goals and desired potential audience
- Discuss whether conference will be free or cost-basis and open to all or to a limited group size
- Brainstorm topics/topic areas to offer, relying on knowledge of resources available
- Determine date(s) for conference
- Determine length of sessions
- Determine number of total sessions overall, and number of sessions to hold each day
- Begin to consider names for conference
- Begin to consider/create logo/branding
- Begin to brainstorm keynote presentation ideas
- Create online survey and send survey link to depository librarians in region for interest in virtual conference; gather interest in topics and request participants to rank/rate, generate additional suggestions; request their interest in presenting, participation in planning

5 Months before:

- Decide on name for conference
- Create Program Planning Subcommittee (P) (found 7 to be good number) (overlap in subcommittees)
- Create Technology Subcommittee (T) (found 3 to be a good number) (overlap in subcommittees)
- Create necessary roles (Coordinator, Speaker, Chat Monitor, Technical Support)
- (P,T) Receive “charge” from leadership detailing work to be accomplished, deadline to bring plans to larger group
- (T) Consider/test Web 2.0 tools useful for planning and for conference
- (T) Create website for conference as starting point for static information**
- (T,P) Create wiki as place to post planning information/exchange ideas, presentation pages
- (P) Examine completed surveys, prioritize most popular session topic ideas



- (P) Initiate contact with some potential speakers to gauge interest/availability
- (P) Create mock schedule options for conference planning group to consider/approve including conference dates and session times
- (P) Create list of other recommendations for conference planning group to consider and forward to them
- (T) Examine/evaluate existing technical documentation related to platform
- (T) Revise/create documentation on using platform, with version for Participants and version for Speakers
- Create “save the date” marketing blurbs
- Brainstorm advertising locations and post these blurbs in all available channels to reach potential audience
- Continue to examine national/local outside possibilities for keynote, communicate with choices, select
- Confirm keynote speaker

4 Months before:

- Send formal schedule to committee for approval; **Adjust/approve final schedule**
- Post schedule on website with time/date/session title information
- Post technical information including FAQs onto website
- Identify Coordinators (drawn from planning committee) to handle each program, guide it to conference

3 Months before:

- Contact potential programs Speakers, invite them to present
- As Speakers are identified, collect biographies and post on website/wiki
- Determine method whereby Speakers submit PowerPoint presentations and handouts
- Determine standards to be used in presentation preparation (versions of word processing, presentation software, etc. to be used that work best for maximum number of participants and software)
- Set 1.5 months prior deadline for receipt of PowerPoint presentations and associated materials
- Create Speaker Agreement Form
- As “verbal” agreement is established, send Speaker Agreement Form including dates, important contacts, technical support details, links to information that will be changeable or posted in the future
- Identify/develop/select registration system to use
- Create text for registration system including text on registration page, text of program information once event is selected from others, text of confirmation email to registrants
- Test registration system and determine when to go live
- Open registration system (2.5 months prior); add link on conference website on live date**
- Formally advertise conference with links to website, program schedule, registration instructions, basic technical information

2 Months before:

- Firmly clarify roles/duties (Coordinator, Chat Monitor, Speaker); identify persons to perform unassigned roles
- Establish Speaker logistics including microphone usage, introduction format, how to seek technical help
- Determine method/location of uploading presentation items to conference platform and other tools for access
- Discuss continuing education credits – how to implement
- (Behind scenes: Coordinators/Speakers work on programs, PowerPoint presentations, communication)
- Monitor registration progress and whether more advertising is called for

1 Month before:

- Determine test times for participants – who will run, how to run, when to schedule; plan to offer several at various times to improve coverage/attendance
- Fill any roles left vacant
- Monitor receipt of PowerPoint presentations; post PowerPoints/handouts to WebJunction
- Begin session run-throughs for those ready to practice
- Monitor registration, conduct second marketing push

3 Weeks before:

- Work on program housekeeping (session mechanics for smooth delivery)



- Fill sessions purposely left open until this point (Lunch and Learn, timely topics) and establish Coordinators
- Promote training sessions for participants and speakers

2 Weeks before:

- Begin holding 1-hour test times for Participants and Speakers to learn how to use conference platform
- Schedule Speakers, Coordinators, and Chat Monitors in conference space to work out bugs of individual programs over coming weeks (can be done if space is available in platform)
- Identify who will archive virtual sessions – best to have backups in case of technical malfunction
- Identify who will capture chat log from sessions, if desired – have backups in case of technical malfunction
- Prepare screen to post on conference platform before/between sessions
- Create master list of each program and associated Coordinators/Speakers/Chat Monitors including phone/email contact information; distribute to entire committee and extras who need it
- Make additional decisions about Web 2.0 – strategy for dealing with technical issues learned during test times
- Encourage participants to load technical plug-ins needed and help troubleshoot as necessary
- Finalize process of loading slides into presentation space
- Provide deadline extension for submission of PowerPoint presentations
- Determine whether group needs additional test times based on attendance/experiences so far

1 Week before:

- Plan welcome/introduction information
- Check status of all presentations – are all loaded and functional?

Days Immediately Preceding:

- Remind attendees of conference via email (using registration database contact information)
- Remind Speakers of conference, with their specific date and time of presentation
- Send email to CE requesters with form/link/survey they will use to earn CE credits

Day(s) of Conference:

- Load presentations for the day in final conference meeting room
- Presenters present, Participants participate
- Collect data on conference attendance (number of persons attending sessions)
- Troubleshoot problems that arise for Presenters and Participants
- Archive sessions and capture chat logs you wish to retain
- If utilizing social media, actively invite participation and post timely updates

Final Day of Conference:

- Send survey link to online Conference Evaluation form for participants
- Immediately debrief as a planning group to discuss outcome, pat each other on the back for accomplishments
- Finalize thank you letter template; distribute to Coordinators
- Set date to examine evaluations and provide to all to help in personalized thank you letters

Weeks Following Conference:

- Coordinators send thank you letters to program speakers and other key individuals
- More intensive debriefing as evaluations are analyzed

Months Following Conference:

- Begin forming general ideas for next conference!

The timeline/checklist reflects our experience creating a 5-day virtual conference in a relatively short timeframe, with a group of 12 hard-working core planners (many with previous experience in planning projects together and possessing a wide variety of skills to tackle the variety of elements of planning/coordination), and sometimes working in huge bursts or at a fevered pitch. This timeline may be adjusted to suit differing needs, realities, and resources.

