

OBI PLANNING TASK LIST

<date>

FACILITY

<hotel>

contract signed

HOST LUNCHEON _____

6 MONTHS PRIOR –
<date>

COST

MENU

LOCATION

SUPPLIES

AV EQUIPMENT

NUMBER OF ATTENDEES

TRACK ATTENDEES

0-3 MONTHS PRIOR
<date>

OBI DINNER

6 MONTHS PRIOR
<date>

COST

MENU

LOCATION

SUPPLIES

AV EQUIPMENT

NUMBER OF ATTENDEES

REFRESHMENTS DURING CONFERENCE

6 MONTHS PRIOR
<date>

OBI PLANNING TASK LIST

<date>

CONFERENCE SCHEDULE

LIST OF POTENTIAL TOPICS

12 MONTHS PRIOR
<date>

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.

SCHEDULE SPEAKER

10-12 MONTHS PRIOR
<date>

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.

10.

LETTERS OF INVITATIONS TO SPEAK

10-12 MONTHS PRIOR
<date>

LETTERS TO CONFIRM SPEAKER SCHEDULE

10-12 MONTHS
<date>

CONFIRMED SPEAKERS

6-10 MONTHS PRIOR
<date>

ASK WHAT REQUIREMENTS FOR PRESENTATION

REQUEST HANDOUT MATERIALS

SEND REMINDER LETTER

REQUEST BIO

THANK YOU LETTER TO SPEAKER

SPEAKER GIFT????

DOES SPEAKER REQUIRE HOTEL ACCOMODATIONS

DOES SPEAKER REQUIRE TRANSPORTATION ACCOMODATIONS

DOES SPEAKER REQUIRE FOOD

OBI PLANNING TASK LIST

<date>

MATERIALS AND REGISTRATION

Locate airport shuttle information

Assemble notebooks

1 month prior
<date>

Binder content

1-3 months prior
<date>

Prepare program and agenda

6 months prior
<date>

Include election information

List of attendees

Membership directory

Guest speakers

Presentation materials

evaluation form

Create name tags

1 month prior
<date>

REGISTRATION DESK

CREATE LIST OF ATTENDEES

REGISTER ATTENDEES

PROVIDE NAME TAGS

PROVIDE NOTEBOOKS

PROVIDE HANDOUTS

9 MONTHS PRIOR

<date>

Select speakers/topics

contact speakers

Send confirmation to speakers

6 MONTHS PRIOR

<date>

Prepare registration brochure

Select menus for luncheon and dinner

5 MONTHS PRIOR

<date>

Make mailing labels

Print conference flier

4 MONTHS PRIOR

<date>

Distribute flier with registration materials

Begin registration file

3 MONTHS PRIOR

<date>

Secure AV needs from speakers

Secure introductions of speakers

2 MONTHS PRIOR

<date>

Send AV needs to hotel

Send preliminary meal guarantee to caterer

Prepare evaluation forms for conference

Send reminders to speakers date/time/place

3 WEEKS PRIOR

<date>

Assemble conference materials

1 WEEK PRIOR

<date>

Confirm AV equipment needs

3 DAYS PRIOR

<date>

Give final guarantees to caterer for number of meals

CONFERENCE

Keep file for all bills

AFTER CONFERENCE

Send letters of appreciation to speakers etc

Assess evaluation forms

Review bills and pay ASAP

OTHER

Get information on after hours entertainment