



How to Plan and Deliver Successful Professional Development Events Planning Checklist

I. PLANNING AND PREPARING

The basics

- Select a date
- Pick a format
- Book the venue
- Develop a budget and funding model
- Decide on meals
- Address other planning questions
- Schedule frequent internal planning meetings with your team
- Offer topics that will support what your audience needs

Instructors and guest speakers

- Identify possible instructors and guest speakers
- Finalize instructor payment logistics as soon as possible
- Gather essential promotional information to use to sell the content to attendees
- Collect essential logistical information from the instructors
- Clarify for instructors your expectations for the event
- Consider a possible orientation meeting

Registration

- Invite the right audience
- Get organized
- Add to the registration form any attendee questions you need answered in advance
- Launch registration only when you're ready
- Be prepared to manage a waitlist
- Close registration early
- Send confirmation emails
- Create pre-requisite acknowledgment forms for tracks relying on prerequisite knowledge

Communication

- Build an event website
- Be a pest
- Anticipate questions
- Create an orientation webinar

Technical Support

- Do as much as you can before it starts
- Be ready for the first day

Discourage no-shows

- Publicize your deadline
- Consider ways to minimize no-shows
- Develop substitute policy if applicable

CEUs

- Decide if your host college would like to offer CEUs
- Develop a process for awarding the CEUs

Travel reimbursement

- Determine if you can reimburse attendee travel expenses
- Develop your reimbursement policy
- Create reimbursement request forms
- Host an “open house” period during your event to answer questions and collect request forms

Hotels

- Identify suitable local hotels
- Arrange a discount block, if possible
- Publicize the discount block

Catering

- Set the lunch menu early, and expect attendees to eat breakfast at their hotels
- Place the order
- Be prepared to manage leftovers

One week out

- Check in with attendees one last time
- Check in with instructors and lunchtime keynote presenters one last time
- Check in with your caterers one last time
- Double-check any classroom reservations one last time
- Understand details about classroom technical support
- Print and assemble your registration welcome packets
- Run a technical test of any video sharing platform

Final prep

- Create a supply box for items you may need during the week
- Conduct a “walk through” meeting with your staff, going through the schedule day by day
- Assign a photographer to document the event
- Prepare any announcement scripts
- Set up an event “staging” space
- Invite VIPs
- Hang signs outside classroom doors identifying the track title
- Prepare event “run sheets” for instructors

II. HOSTING

In-person check in

- Welcome the attendees
- Consider social distancing stickers
- Be ready for “walk ups”
- Prepare for latecomers
- Plan for badge recycling

Lunch content

- Decide on a format
- Be ready for attendees to ask for a copy of the featured slide deck
- Conduct an AV system check with your presenters prior to the lunch start time
- Deliver housekeeping announcements and reminders before dismissal
- Plan in advance who will introduce the presenter
- Use any screens in the room used for lunch for additional content

Serving the food for lunch

- Determine serving logistics
- Accommodate vegetarians
- Understand how your caterer handles headcounts
- Follow college rules on how your college handles gratuity

Break room

- Publicize the break room
- Make the break room available all day if possible
- Stock the break room
- Make use of the white board (assuming your break room is in a classroom) for further messaging

Activities

- Plan a social event, if possible
- Conduct lunch prize drawings if you can get donations to give away
- Host other activities

Social media

- Promote hashtag use
- Create a list of photos you want your photographer to take
- Record lunch presentations and webinars

Other housekeeping

- Manage sign-in attendance sheets
- Collect photo release forms
- Make yourself visible
- Keep a record of problems or questions that arise

III. WRAPPING IT ALL UP

Surveys

- Offer an anonymous suggestion box
- Prepare first day surveys
- Prepare overall end-of-event surveys
- Consider steps to verify the surveys were completed by all
- Publicize the surveys
- Prepare longitudinal impact surveys

Certificates

- Develop a certificate policy
- Print the certificates

Lessons learned

- Debrief and discuss as a team what you could have done differently

Other wrap tasks

- Make sure vendors get paid
- Send a "thank you" email late in the afternoon on the last day
- Contact the no-shows
- Archive event paperwork
- Update your distribution lists for next time

IV. ONLINE EVENTS

- Vet your instructor
- Send final email reminders
- Standardize attendance processes
- Minimize cybersquatters – control who gets in
- Preparing attendees for online events
- Create an inviting atmosphere for attendees
- Preparing instructors for online events
- Managing online logistics
- Avoid lunch programs
- Decide if you'd like to record the content
- Manage the back end for your presenter if you're the host and there is no TA
- Use your email autoreply to support latecomers



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