



Stanford Sierra Conference Planning Checklist

The **California conference** planning experts at Stanford Sierra Conference Center at Fallen Leaf Lake understand that a successful meeting is the product of thoughtful organization and adhering to a detailed schedule. From beginning to end, the Stanford Sierra team will help your group plan an inspiring, fun, and educational meeting at Fallen Leaf Lake. Use this '**Conference Planning Checklist**' to begin actualizing your meeting at Stanford Sierra or download the printable version.

Key

Orange = Attendee Arrangements

Gray = Budget & Finances

Red = Conference Programming & Administrative Tasks

Black = Dining Arrangements

Purple = Marketing

Light Green = Outdoor Recreation & Entertainment

Yellow = Speakers Arrangements

Blue = Travel Arrangements

Dark Green = Venue & Accommodations

12 Months to Conference

- Budget & Finances** – Establish a budget for your meeting.
- Venue & Accommodations** – Contact Stanford Sierra about available spring or fall dates for an all-inclusive conference package with meeting rooms, meals and accommodations for groups of 25 – 180 participants. Meal options include a wide variety of gourmet menus, networking cocktail hour appetizers and beverages, coffee break snacks, and more. From buffet style meals to full-service dining, Stanford Sierra can cater to your group's day-to-day needs. Once dates are set, finalize the event contract with details such as the appropriate number of [meeting rooms](#) and [cabins](#), and return with initial deposit to Stanford Sierra.
- Conference Programming & Administrative Tasks** – Develop a conference theme. Create a list of sessions, lectures, and activities, and compile a list of potential meeting speakers and participants.

11 Months

Speakers' Arrangements – Contact potential meeting speakers about participating.

- Outdoor Recreation & Entertainment** – Discuss activities and [outdoor recreation](#) options with Stanford Sierra. Options include guided hikes, kayaking, yoga classes, pontoon boat rides, volleyball games, tennis matches, and more.
- Outdoor Recreation & Entertainment** – Discuss evening entertainment options with Stanford Sierra. Choose from unique, fun activities, including disco bingo, beach sing-a-longs, and lakeside bonfires with s'mores. If your budget allows, consider hiring a local entertainer or adventurer such as Rick Gunn, the [Soulcyclor](#).

10 Months

- **Marketing** – If applicable, design a brand identity for your meeting.

9 Months

- **Speakers** – Confirm speaker attendance and discussion topics.
- **Conference** – Draft the conference program of events and activities.

8 Months

- **Travel Arrangements** – Begin making travel arrangements for conference administrators, speakers, and other important participants. Stanford Sierra offers an airport shuttle service as part of our all-inclusive conference packages.
- **Speakers** – Send email to speakers with information on their travel arrangements, accommodations, speaking times, and other important conference details.
- **Marketing** – Begin writing and designing the meeting invitation, welcome letter, program of events, thank you letter, meeting evaluation, and other pertinent print documents.

7 Months

- **Speakers** – Request a biography and a photo from speakers to use on the meeting website.
- **Marketing** – Build a meeting website, if applicable. Link to the Stanford Sierra site
- **Marketing** – Add speaker bios and photos to the website along with the program agenda.

6 Months

- **Venue & Accommodations** Pay the second deposit to Stanford Sierra.
- **Marketing** – Launch the meeting website.
- **Dining** – Review menus provided from Stanford Sierra and discuss add-on options including hors d'oeuvres for networking social hours and/or a hiker lunch bar if a guided hike is planned in the afternoon. If you want to dine al fresco, we can plan an outdoor barbecue lunch. Weather permitting, all coffee breaks are held on our lakefront deck. Also, Stanford Sierra can accommodate all dietary needs including gluten-free, vegetarian and vegan.
- **Outdoor Recreation & Entertainment** – Finalize schedule of guided hikes, group kayaking outings, and other daytime recreation. Consider setting aside time for meeting participants to explore Fallen Leaf Lake on their own.
- **Outdoor Recreation & Entertainment** – Finalize schedule of evening entertainment. Leave some evenings free so meeting participants can gather informally in one of the cozy rooms with fireplace in Stanford Sierra's main lodge.

5 Months

- **Conference** – Decide how to kick off the meeting. Stanford Sierra encourages groups to take advantage of the location and camp-like environment by scheduling an outdoor icebreaker or fun activity as the first event on the schedule. Introductory activities can range from classic camp games to a specially designed team-building activity hosted by an outside facilitator.
- **Conference** – Continue to edit the conference's program as updates occur. Work towards finalizing the program.
- **Marketing** – Decide on a gift bag item. Consider reusable water bottles printed with your meeting or organization's logo. Stanford Sierra has partnered with CamelBak in providing quality reusable water bottles. At Stanford Sierra's altitude, drinking water is vital, and meeting attendees will appreciate having the bottles for guided hikes!

4 Months

- **Marketing** – Send out emails to prospective participants about registering for the meeting, and begin accepting registration on the meeting website.
Be sure to ask registrants about any dietary needs for meals and mobility accommodations for their lodging.
- **Marketing** – Start compiling gift bag items.

- **Venue** – Determine dining room table décor, meeting room décor, and welcome items to be placed in attendees' cabins, if applicable.
- **Dining** – Confirm dining, coffee break snacks and beverages, and other food selections with Stanford Sierra.
- **Speakers** – Request from speakers a complete list of presentation needs that includes meeting room layout and furniture, A/V equipment, etc.

3 Months

- **Conference** – Finalize the conference program.
- **Marketing** – Update the meeting website with the updated program.
- **Venue** – Determine need for conference signage.
- **Marketing** – If needed, begin designing conference signage.
- **Venue** – Determine volunteer needs and finalize A/V equipment needs, tables and chairs, other furniture, and meeting room needs.
- **Marketing** – Print the meeting invitation, welcome letter, thank you letter, meeting evaluation, and other pertinent print documents.
- **Marketing** – Upon receiving the meeting invitation, mail it to potential meeting participants.
- **Attendees** – Contact attendees about airport shuttle needs and encourage them to schedule their shuttle with SSCC.

2 Months

- **Marketing** – If applicable, design conference signage.
- **Marketing** – Print conference signage.
- **Marketing** – Complete design of the conference program, and send to the printer.
- **Venue** – Use the [lodging](#) chart provided by SSCC, and begin assigning cabins to conference administrators, speakers, and participants. When participants arrive, the SSCC team will direct guests to the correct cabin.
- **Venue** – Use the schedule template provided by SSCC, and begin adding details to the event schedule including times, seating arrangements and A/V needs for meetings, and food & beverage needs for social hours and dinners.
- **Speakers** – Send out a reminder email to speakers with details on their travel arrangements and speaking schedule.

1 Month

- **Marketing** – Send out a reminder email to participants.
- **Venue** – Use the schedule template provided by SSCC as a working document and continue to add details to the event schedule
- **Venue** – If you are providing wine and beer at your event's social hours and dinners, email wine and beer selections to Stanford Sierra.

2 Weeks

- **Marketing** – Begin assembling gift bags and conference information packets.
- **Attendees** – If applicable, compile an attendee list. Create and print attendee name tags,
- **Venue** – Share lodging assignments with Stanford Sierra.
- **Venue** – Share the final schedule with Stanford Sierra including presentation needs from the speakers, meeting room layout, A/V equipment, attendee number at each event, etc.

1 Week

- **Marketing** – Send out a reminder email to participants.
- **Marketing** – Double check quantity of gift bags and information packets.
- **Conference** – Meet with volunteers, if possible, to discuss jobs and tasks.
- **Dining** – Update Stanford Sierra with any last-minute changes to the attendee list.

Week of Conference or Meeting

- **Travel** – Prepare to field calls and emails from speakers and attendees with travel changes or other last-minute issues.
- **Conference** – Enjoy the schedule of events!
- **Outdoor Recreation** – Meeting participants and speakers go on a guided hike up the Church Trail to Angora Lakes.
- **Outdoor Recreation** – For the afternoon break on the next day, attendees head to the boat dock and take out a kayak, stand-up paddle board, pedal boat, or row boat.
- **Outdoor Recreation** – After the sun has set, attendees go on a stargazing pontoon boat ride on Fallen Leaf Lake or enjoy a lakeside bonfire and s'mores.

Week After Meeting

- **Speakers** – Send thank you letters to speakers.
- **Attendees** – Send thank you letters to attendees.
- **Budget** – Review bills and make payments.
- **Conference** – Review evaluation forms. Discuss successes and ways to improve the next conference.

For more details on our customized and all-inclusive conference packages, contact the corporate event planning experts at Stanford Sierra Conference Center. We are happy to assist you and your team with developing a successful California conference. Contact Stanford Sierra meeting specialists at (530) 542-5600.