MEETING PLANNING ASSISTANCE CHECKLIST

4 MONTHS AND MORE PRIOR TO EVENT
- ☐ Establish event goals and objectives
- ☐ Select date
- ☐ Identify venue and negotiate details
- ☐ Negotiate with hotel and or Convention Center for:
  - o meeting rooms
  - o sleeping rooms
  - o audio/visual equipment
  - o food/beverages
- ☐ Book meeting site and support services. (Check calendar of local events to avoid conflicting or inappropriate dates
- ☐ Develop Event Master Plan
- ☐ Determine the objective of the meeting and develop the program and budget
- ☐ Get cost estimates (e.g., room rental, food & beverages, equipment, speaker fees, travel, etc.) and create a budget
- ☐ Recruit event committee, event manager or chair and establish sub-committee chairs
- ☐ Create and launch publicity plan & brand your event (ensure staff and/or volunteers are identified to manage specific tasks – e.g., media relations, VIP coordination, printed material design & printing coordination, signage, online /social media, etc.)
- ☐ Invite speakers and inform them about your attendees and the facilities of the hotel, including audiovisual capabilities
- ☐ Confirm speakers/presenters/entertainers
- ☐ Identify and contact sponsors/partners
- ☐ Registration fees
- ☐ Set up/enable online registration
- ☐ Sponsor levels/amounts
- ☐ Send letters of agreement to hotel and suppliers
- ☐ Set up master account for your meeting charges with the hotel (authorize who can sign charges)
- ☐ Notify attendees
- ☐ Make travel arrangements

> *start your planning as early as possible.

90 DAYS PRIOR TO EVENT
- ☐ Create timeline and checklist
- ☐ Develop, design and distribute meeting promotion and marketing materials
- ☐ Get bio information, photo
- ☐ Finalize presentation/speech topics
- ☐ Create meeting invitation list
- ☐ E-mail meeting announcement to invitation list
- ☐ Receive and process registration forms
- ☐ Create participant confirmation letter
- ☐ Collect information on speakers/facilitators
- ☐ E-mail participant confirmation letter and travel information sheet
- ☐ Arrange and finalize all catering
- ☐ Investigate need for any special permits, licenses, insurance, etc.

- ☐ Determine and arrange all details regarding mnu, A/V equipment, registration set-up, parking, signage, etc.
- ☐ Review security needs/plan for the event with venue manager
- ☐ Develop draft program
- ☐ Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
- ☐ Develop publicity pieces -- e.g., newsletter articles and/or ads, radio spots, print blog posts articles for submission to other publications and/or ads, etc.
- ☐ Request logos from corporate sponsors for online and printed materials
- ☐ Develop and produce invitations, programs, posters, tickets, etc.
- ☐ Develop media list & prepare News Release, Media Advisory, Backgrounder and all media kit materials (e.g., speaker info, photos, etc.)
- ☐ Create event page on your website
- ☐ Enable/create email event notifications
- ☐ Create a Facebook event page
- ☐ Develop a promo video and post on YouTube and your Facebook page
- ☐ Register your event on a variety of online event calendars
- ☐ Create some buzz on your blog or member forums
- ☐ Determine VIPs and create invitation & tracking document (e.g., spreadsheet)
- ☐ Send guest rooming list to the hotel

  OR
- ☐ Monitor individual reservation call-in (observing hotel cut-off date for making reservations)
- ☐ Prepare travel information sheet
  - ☐ Local transportation
  - ☐ Directions/maps
- ☐ Self-pay participants

  AND/OR
- ☐ Sponsored event
- ☐ Coordinate participant air travel with designated travel agent

2 MONTHS PRIOR

- ☐ Send reminders to contact list re registration/participation
- ☐ Confirm travel/accommodation details
- ☐ Request copy of speeches and/or presentations
- ☐ Sponsorship: Follow up to confirm sponsorships and underwriting
- ☐ Release press announcements about keynote speakers, celebrities, VIPs attending, honorees, etc.
- ☐ Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc
- ☐ Confirm menus, room setups and supplies in writing with your event manager.
- ☐ Monitor speakers' presentation development and offer assistance in reproducing any handouts
- ☐ Order signs and printed materials
- ☐ Include the agendas, suggested dress and other instructions on your website
- ☐ Order gifts and amenities. Arrange deliveries of gifts (and meeting registration materials) with your hotel contact.

2 WEEKS PRIOR

- ☐ Have all committee chairs meet and confirm all details against Master Plan – and ensure back-up plans are developed for any situation (e.g., back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.)

- ☐ Finalize event script
- ☐ Brief any/all hosts, greeters, volunteers about their event duties and timelines
- ☐ Final seating plan, place cards, etc.
- ☐ Provide final registration numbers to caterer
- ☐ Make print and online copies of any speeches, videos, presentations, etc.
- ☐ Final registration check, name badges & registration list
- ☐ Determine photo op and interview opportunities with any presenters, VIPs etc. and confirm details with interviewee and media
- ☐ Check with your speakers regarding the progress of their presentations, audiovisual and logistical arrangements
- ☐ Submit rooming list to hotel and confirm arrangements for amenities
- ☐ Ship materials to arrive 24 hours before your arrival, and confirm arrival before leaving your office.
- ☐ Confirm all audiovisual requirements and produce slides
- ☐ Make arrangements for shipping materials back to your office after the meeting.
- ☐ Confirm (72 hours in advance) your meal and beverage counts for the first day food functions.
- ☐ Take a complete master set of all handouts with you. (If your shipment of materials is lost or delayed, you can arrange to have your master set photocopied.)

DAY BEFORE
- ☐ Pre-conference meeting with necessary staff
- ☐ Create participant name tags
- ☐ Develop training/seminar/conference agenda
- ☐ Provide speaker(s) bio(s)
- ☐ Create final participant roster
    - o Alphabetize by participant last name
    - o Group by jurisdiction/state and alphabetize by participant last name
- ☐ Create participant tent cards, if needed
- ☐ Develop participant meeting evaluation form
- ☐ Assist with collecting meeting materials (printing, binders, packets, local restaurants/sites/ activities , etc.)
- ☐ Confirm media attending
- ☐ Ensure all signage is in place
- ☐ Ensure registration and media tables are prepared and stocked with necessary items (e.g., blank name badges, paper, pens, tape, stapler, etc.)
- ☐ Ensure all promo items, gifts, plaques, trophies, etc. are on-site
- ☐ Review details and walk through your meeting space with your property event manager
- ☐ Personally inspect shipped materials to be sure that all of your items have arrived and that they are in good condition
- ☐ Check the hotel function board and front desk for posted times and locations of your functions.

DURING MEETING
- ☐ Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- ☐ Check-in with each Committee Chair to ensure their team is on track
- ☐ Conduct meeting registration
- ☐ Set up a resource room/display table

☐ Approve charges to Master Account on a daily basis
☐ Serve as primary hotel liaison/troubleshooter
☐ Check function space one hour in advance
☐ Notify your event manager immediately of any changes in your plans or requirements
☐ Sign banquet checks each day and keep an ongoing record of your on-site expenses

POST-MEETING
☐ Meet with your event manager to review your sessions, charges and receipts
☐ Share with your event manager the names of personnel who have provided extraordinary service.
☐ Collect participant evaluation forms
☐ Return shipment of meeting materials
☐ Review final meeting charges
☐ Update participant roster

BUDGET   AMOUNT

☐ Speakers' expenses and fees   _____

☐ Printing   _____

☐ Supplies (notebooks, name tags, etc.)   _____

☐ Staff hotel per diem   _____

☐ Food/beverages   _____

☐ Audio/visual equipment   _____

☐ Travel (staff and participants)   _____

          TOTAL   _____