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:
  - meeting rooms
  - sleeping rooms
  - audio/visual equipment
  - 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
  - Alphabetize by participant last name
  - 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

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Speakers’ expenses and fees</td>
<td></td>
</tr>
<tr>
<td>Printing</td>
<td></td>
</tr>
<tr>
<td>Supplies (notebooks, name tags, etc.)</td>
<td></td>
</tr>
<tr>
<td>Staff hotel per diem</td>
<td></td>
</tr>
<tr>
<td>Food/beverages</td>
<td></td>
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<tr>
<td>Audio/visual equipment</td>
<td></td>
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<tr>
<td>Travel (staff and participants)</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
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</tbody>
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