

MEETING PLANNING ASSISTANCE CHECKLIST



PRE-MEETING PREPARATION

- ☐ Create timeline and checklist
- ☐ Develop, design and distribute meeting promotion and marketing materials
- ☐ Negotiate with hotel for: meeting rooms, sleeping rooms, audio/visual equipment, food/beverages
- ☐ Find speakers/facilitators
- ☐ 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 or fax participant confirmation letter and travel information sheet
- ☐ Arrange and finalize all catering

FACILITATE RESERVATIONS

- ☐ Send guest rooming list to the hotel
- ☐ OR, Monitor individual reservation call-in (observing hotel cut-off date for making reservations)

TRAVEL INFORMATION

- ☐ Prepare travel information sheet: Local transportation, Directions/maps

Method of payment for participants travel

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

MEETING MATERIALS

- ☐ 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.)

DURING MEETING

- ☐ 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

POST-MEETING

- ☐ Collect participant evaluation forms
- ☐ Return shipment of meeting materials
- ☐ Review final meeting charges
- ☐ Update participant roster

BUDGET

- ☐ Speakers' expenses and fee
- ☐ Printing

☐ Supplies (notebooks, name tags, etc.)

☐ Staff hotel per diem

☐ Food/beverages

☐ Audio/visual equipment

☐ Travel (staff and participants)

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