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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