

Checklist of Tasks for the Meeting

FIRST STEPS (occur concurrently rather than serially)		
	Start Date	Complete Date
Date for the Meeting		
Review calendars of other organizations to see when conferences and annual meetings are occurring.		
Identify dates that don't conflict with other events		
Select a preferred date		
Check with site about availability		
If necessary, revise date to suit site		
Finalize date for the meeting with site		
Meeting Site/Location		
Consider available, appropriate spaces		
Decide on preferred location - considering space, lodging, restaurants, access		
Check with preferred location about available dates		
Hold one or more dates for final decision		
After date finalized, contact site to begin contract		
Confirm contract via deposit for the space		
Finalize amount of space		
Finalize configuration of rooms		
Complete payment for event space after invoice received.		
Meeting Agenda		
Decide on timeline for meeting sections		
Develop draft of agenda using sample provided		
Finalize agenda		
Invitees		
Determine who will be invited to participate		
Decide on appropriate method/person to invite each participant		
Hotel (if overnight accommodations are necessary)		
Choose hotel near meeting site		
Check on room availability for selected date		
Verify room rate and reservation procedures		
Hold a block of rooms for meeting date		
Catering		
Identify a caterer		
Confirm menus and costs with caterer and complete contract		
Confirm number of guests with caterer		
Confirm changes and/or special needs with caterer		
Make reservation(s) for meals outside of meeting, if necess.		
SECOND STEPS		
	Start Date	Complete Date
Initial Information to Invitees		
Send introductory information to invitees/participants via email; ask for confirmation		
Attach meeting announcement (see sample announcement)		
Attach lodging/travel information for out-of-town guests		
Attach parking/location information for local guests		
Secondary Information to Confirmed Attendees		
Send second email message to confirmed attendees with more info on meeting		
Send instructions, regulations, and forms about travel reimbursement to out-of-town guests		
Provide specific info about parking to local guests		
Send maps/directions to meeting location to local guests		
Provide roster to guests and ask them to check/correct their entries		
Final Information to Attendees via Email		
Send final confirming/reminder email to attendees		
Attach final agenda		
Attach map of meeting location		
Attach any pre-meeting readings or preparatory information		
Staffing of Meeting		
Identify host(s) for meeting		
Identify logistical specialist for meeting		
Identify notetakers for small groups		
Notify all notetakers of expectations		
Identify registration table staff		
Notify registration table people of work time and duties		
Identify and inform discussion group leaders		
Give instructions to discussion group leaders		
THIRD STEPS		
	Start Date	Complete Date

			Start Date	Complete Date
Hospitality Needs				
Plan welcome/registration station				
Create method to pick up packets of meeting information				
Create check-in materials, if needed				
Decide on table décor for meeting tables				
Materials for Meeting Day				
Confirm AV with meeting site staff				
Develop plan for AV needs and requirements				
Check the any laptops to be used for capacity to handle various media/software				
Create table signs, if needed				
Decide what signage needed for the meeting space				
Create & print welcome/title sign on foam core for welcome area				
Make sure easels on hand for signs and flip charts				
Create and print identification signs for rooms, if needed				
Create and copy special guidelines for group discussion facilitators				
Send or give special guidelines to group discussion facilitators				
Create sign in sheets for registration table				
Create Meeting Notebooks/Folders/Packets Materials				
Create and print labels for spine of notebooks (if used)				
Create and print/copy tab index document (if needed)				
Create and copy any special materials pertinent to meeting topic(s)				
Copy bibliography of meeting topics (provided online)				
Complete and copy attendee roster				
Complete and copy final meeting agenda				
Copy speakers' handouts (provided online)				
Copy speaker and panelist bio document (provided online)				
Get floor plan of meeting site and make copies				
Get map from hotel and/or parking to meeting site and make copies				
Name Badges				
Order name badges				
Design format for badges				
Print name badges				
Decide on small group coding for name badges, if needed				
Code nametags for small groups and seating, if necessary				
Create and print table tents for all attendees, if desired				
Assemble Meeting Notebooks/Folders/Packets				
Put stickers on spines (if used)				
Title page (provided online)				
Tab index (if used)				
Final Agenda				
Attendee roster				
Speaker/Panelist Bios				
Speakers' presentations or handouts				
Instructions/guide for small discussion groups				
Special informational materials pertinent to meeting topic(s)				
Bibliography				
Maps of building and building location				
Other materials from participants/sponsors, if used				
FINAL STEPS				
			Start Date	Complete Date
Special Folders of Info for Host/Logistical Specialist				
Agenda				
Roster of all guests				
List of those in small group discussions				
Guideline documents for groups				
Instructions on where small groups meet				
Set Up of Registration Table				
Welcome/Title sign				
Registration table sign(s), if used				
Sign in sheets				
Meeting notebooks/folders/packets				
Name badges				
Extra blank name badges				
Items to Take to Meeting				
Computer for presentations				
Connection to internet				
Extra pads, pens, pencils, extra name badges				
Easels, flip chart pads, and flip chart markers				

Paperclips and stapler		
Scissors		
Table Signs		
Table Tents, if used		
Room signs, if used		
Laptops for note takers, if used		
Disks/flash drives for note takers' laptops, if used		
POST MEETING TASKS		
	Start Date	Complete Date
Collect and compile notes from meeting and small group discussions		
Disseminate proceedings to appropriate individuals/groups		
Thank those who assisted with meeting		
Process guest reimbursements (if needed)		
Process vendor invoices (if any)		