

Meeting Planner Checklist

Define Meeting/Event Goals and objectives _____ ☐ Type of meeting (team building, planning, etc.)_____ ☐ Decide whether formal or informal _____ ☐ Meeting theme, if any _____ ☐ Number of potential attendees _____ Establish Budget ☐ Master accounts _____ ☐ Deposit accounts _____ ☐ Set registration fees _____ ☐ Expenses: -Printing ____ -Speaker fees _____ -Mailing and postage _____ -Entertainment _____ -Exhibit space _____ -Meals _____ -Signs and decorations _____ -Extra help _____ -Beverages and snacks _____ -Transportation _____ -Other expenses _____ -Total expenses _____ ☐ Income: -Registration fees ___ -Exhibit space rental ____ -Override on functions _____ -Contributions _____ -Other financing _____ -Total income _____ Set Timeframe ☐ Length of meeting ____ ☐ First, second and third choice meeting dates Establish Meeting Content ☐ Programs _____ ☐ Speakers and presenters _____ ☐ Entertainment ____ ☐ Tentative agenda _____ ☐ Audiovisual requirements _____

☐ Companion/spouse program _____

Exhibits ☐ Allocate booth space _____ ☐ Exhibitor policies and costs _____ ☐ Exhibit hours _____ ☐ Setup and teardown times _____ ☐ Cartage firm _____ ☐ Freight shipping and receiving guidelines for exhibitors ☐ Storage for early shipments _____ ☐ Insurance and liability _____ ☐ Food and beverage ____ Attendance Promotion ☐ Attendance goals ☐ Prepare meeting program and schedule _____ ☐ Pre-meeting press releases _____ ☐ Pre-meeting advertisements _____ ☐ Exhibitor solicitation materials _____ ☐ Meeting announcements _____ ☐ Initial and follow-up mailings _____ Select Hotel/Venue ☐ Establish hotel/venue contact person _____ Phone _____ Fax ____ ☐ Tax-exempt certificates if applicable _____ ☐ Meeting rooms -Sq. ft. needed ____ -Number of rooms available _____ -Type of rooms ____ -Setups to be used _____ -Audiovisual needs _____ -Cost ____ -Ventilation ___ -Desired amenities _____ -Access _____ ☐ Exhibit space -Sq. ft. needed _____ -Number of rooms available _____ -Audiovisual needs _____ -Storage _____

-Access

-Ceiling height _____

-Utilities _____

-Ventilation _____

-Lighting _____

-Decorating _____

☐ Breakout rooms available	☐ Tours and sightseeing
☐ Specify ADA accessibility needs	☐ Children's activities
-Sign language interpreter	
-Sight-impaired accommodations	☐ Nightlife
-Wheelchair accessibility	· · · · · · · · · · · · · · · · · · ·
☐ Accessibility/local transportation	
Parking	Transportation
-Free or Rate:	☐ Schedules for airlines, buses, etc.
☐ Appearance	☐ Airport to hotel transportation
-Inside 1 2 3 4 5 (5=best)	☐ VIP transportation
-Outside 1 2 3 4 5	☐ Transportation to functions and leisure activities
□ Sleeping rooms	No. of the Control of
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-Rates	OODATIE).
-Number available	Determine security requirements for viria, emission, means and
☐ Business services available (fax, voicemail, etc.)	outside functions
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☐ Construction/renovations planned during meeting	
☐ Other events at the venue during meeting	
Arrange Housing	Registration
☐ Room block commitments	
☐ Reservation policy	
Date of reservation cutoff	8
☐ Cancellation policy	
☐ Deposit policy	
☐ Confirm check-in/check-out times	Market Ma
☐ Design reservation form	rs ·
☐ Send information to conference participants	
☐ Complimentary rooms	(T) T (TT) 1
U VIP accommodations	
☐ Hospitality suites	
☐ Signature authorization	☐ Welcoming ceremony ☐ Nametags ☐ Nametags ☐ ☐ Nametags ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐
Publicity	Ç
☐ Local media	Accounting
☐ News releases for trade media	☐ Budget tracking system
☐ Photographers	☐ Master account billing
☐ Press room if necessary	☐ Individual billing
☐ Publicity kits	Gratuities
,	☐ Final billing
Food and Beverage	☐ Budget vs. actual expenses recap
☐ In-house or outside catering	
☐ Number of banquets and location	
Other meals to be served	
☐ Format of each meal	
☐ Attendance at each meal	
☐ Select menus	
-Specify any dietary restrictions necessary	
☐ Obtain menu costs	
☐ Establish ticket system for meals and beverages	
☐ Additional service personnel	
☐ Food and beverage for hospitality suites	
Leisure Activities	
☐ Decide on activities	
☐ Reserve outside facilities	
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