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
- Security needs
- Signage and decorations

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
  - Email
- Tax-exempt certificates if applicable
- Meeting rooms
  - Sq. ft. needed
  - Number of rooms available
  - Type of rooms
  - Setups to be used
  - Audiovisual needs
  - Cost
  - Lighting
  - Ventilation
  - Desired amenities
  - Access
- Exhibit space
  - Sq. ft. needed
  - Number of rooms available
  - Audiovisual needs
  - Cost
  - Storage
  - Drayage
  - Access
  - Ventilation
  - Ceiling height
  - Lighting
  - Utilities
  - Decorating

Tear it out and say
“I got it from Midwest Meetings!”
Breakout rooms available
Specify ADA accessibility needs
  - Sign language interpreter
  - Sight-impaired accommodations
  - Wheelchair accessibility
Accessibility/local transportation
Parking
  - Free or Rate:
Appearance
  - Inside 1 2 3 4 5 (5=best)
  - Outside 1 2 3 4 5
Sleeping rooms
  - Rates
  - Number available
Business services available (fax, voicemail, etc.)

Construction/renovations planned during meeting
Other events at the venue during meeting

Arrange Housing
Room block commitments
Reservation policy
Date of reservation cutoff
Cancellation policy
Deposit policy
Confirm check-in/check-out times
Design reservation form
Send information to conference participants
Complimentary rooms
VIP accommodations
Hospitality suites
Signature authorization

Publicity
Local media
News releases for trade media
Photographers
Press room if necessary
Publicity kits

Food and Beverage
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

Tours and sightseeing
Children’s activities
Shopping
Nightlife
Pre- and post-convention tours

Transportation
Schedules for airlines, buses, etc.
Airport to hotel transportation
VIP transportation
Transportation to functions and leisure activities

Security
Determine security requirements for VIPs, exhibits, meals and outside functions
Medical emergency plan
Names and phone numbers for local police, fire departments and hospitals

Registration
Policies and procedures
 Necessary forms
Registration areas
Equipment, supplies and signage for registration area

Reception
Airport greetings
VIP protocol
Host committees
Welcoming ceremony
Nametags

Accounting
Budget tracking system
Master account billing
Individual billing
Gratuities
Final billing
Budget vs. actual expenses recap

Notes