

# 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**

**AMOUNT**

<input type="checkbox"/> Speakers' expenses and fees	_____
<input type="checkbox"/> Printing	_____
<input type="checkbox"/> Supplies (notebooks, name tags, etc.)	_____
<input type="checkbox"/> Staff hotel per diem	_____
<input type="checkbox"/> Food/beverages	_____
<input type="checkbox"/> Audio/visual equipment	_____
<input type="checkbox"/> Travel (staff and participants)	_____
<b><u>TOTAL</u></b>	_____

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