

Meeting Planning Checklist

Convening the Planning Committee

Two-three months prior

- Convene a group of people to act as a planning committee for the meeting/event
- Develop an agenda for the planning committee meeting
- Gather contact information and determine the best way to communicate with the group
- Assign everyone specific tasks with timelines for completion
- Take notes

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Planning the Meeting/Event

Two months prior

- Define the purpose of the meeting/event
- Determine the appropriate type of meeting/event- Informational, Town Hall, FACTS, or World Café.
- Depending on type of meeting/event
 - Determine guest speaker or panel of speakers
 - Set time limits and develop parameters for guest speakers
 - Contact guest speaker(s) and panelists
 - Choose a facilitator or someone to lead the meeting
 - Develop meeting agenda
- Determine if there is an organization that could sponsor or co-sponsor the event
- Develop a budget (if there are funds available)
 - Determine if food will be provided (solicit donations if needed)
- Determine date and time for meeting/event that works for the majority of members
- Determine location that will accommodate needs of audience

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- Develop roles and responsibilities for members (greeters, clean up, etc.)
- Identify the key community leaders who need to attend
 - Develop an invitation list

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Publicity and Promotion of the Meeting/Event

One month prior

- Draft letters of invitation to key community leaders
 - Mail letters of invitation (make sure to include an RSVP if ordering food)
- Prepare press release
- Contact local media
- Prepare letter of invitation to the community
- Develop Public Service Announcements
- Develop flyers for distribution throughout the community

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Preparations for the Meeting/Event

Two-three weeks prior

- Order needed items
 - Food (if being provided)
 - Nametags, participant materials (brochures, folders, etc.)
 - Easel pads and markers
- Reserve/locate needed items
 - AV materials (laptop, LCD projector, screen, portable microphone, extension cords, etc.)

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One week prior

- Confirm arrangements
 - Finalize room set-up
 - Select table set-up to fit with type of meeting (theater style, tables in U-shape, small rounds, etc.)
 - Number/location of display tables,
 - Number/location for registration tables
 - Number/location of food/beverage tables
 - Meal count, equipment needs, etc.
- Organize participant packets (and materials for display tables, if being provided)
- Send out reminder emails (especially to those who volunteered to serve as greeters, assist with registration, help with set-up, etc.)

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At meeting/event

- Arrive early to check on room arrangements and adjust as needed.
- Set up Audio-visual equipment, check microphones (if needed)
- Enjoy!

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Immediately following the meeting/event

- Make sure to pack all audio-visual items (don't forget cords!)
- Send out appropriate thank yous.
 - If local paper allows, develop "Letter to the editor" that extends thank you to speakers and those who helped to organize or fund the meeting/event.

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