CHECKLIST

This checklist was adapted from the AMA Guide for Meeting and Event Planners by Catherine Price (AMACOM, New York City)

BEFORE THE MEETING
- Arrive two to four days before the meeting.
- Check on arrival of shipments, and arrange for delivery of equipment/supplies to appropriate on-site locations.
- Follow up on equipment deliveries to proper areas (staff office, registration, exhibit area, press room, etc.).
- Begin setting up staff office.
- Conduct pre-con meeting.
- Provide updates on attendee counts and guarantees to hotel and outside suppliers.
- Contact other suppliers (ground transportation, destination management company, audiovisual company, florist, etc.) to confirm details of service.
- Conduct briefings for registration team, staff office, door monitors, airport greeters and all other personnel for the meeting, both paid and volunteer.
- Set up registration area and oversee setup of other areas (exhibit hall, general session area).
- Coordinate distribution of VIP gifts or amenities to attendees' rooms.
- Check cleanliness and proper functioning of elevators, rest rooms and other public facilities.
- Handle advance room check-in for VIPs and key meeting participants, such as speakers.
- Identify resources near the hotel (secretarial services, photocopier, office supplies, florists).

DURING THE MEETING
- Check hotel reader board daily for accuracy.
- Meet daily with key hotel and meeting staff.
- Check each meeting room for accurate setup 30 to 60 minutes prior to the start of the function. (Do microphones and audiovisual equipment function properly? Is a pitcher of water, with ample drinking glasses, set up for speakers? Are session materials ready for distribution?) Allot more time before a major session.
- Check all food and beverage areas for readiness and accuracy 30 to 60 minutes prior to function. Allot more time before a special event, such as an awards banquet.
- Remove cash from safety deposit box and set up cash boxes for each registration worker.
- As large amounts of registration income are received, balance cash against registration records, and place in safety deposit box or local bank account.
- Conduct personnel check-in to make sure all have arrived and are at assigned areas.
- Provide personnel with items needed for daily activities, such as function sheets and evaluations for door monitors.
- Check to be sure all speakers have arrived and will be at their appropriate sessions on time.
- Assign staff to conduct and record attendee counts in meeting rooms.
- Pick up messages regularly from staff office, and maintain ongoing communications with suppliers and personnel.
- Review charges from hotel and suppliers daily.
- Obtain a daily printout of guest rooms used by your group.

AFTER THE MEETING
- Have all cash transferred to your organization's bank account, or request a cashier's check for safe transport home.
- Prepare thank-you notes for hotel staff and suppliers, and distribute individual gratuities.
- Conduct a post-conference meeting with event staff and hotel staff.
- Pack all conference materials and equipment for return shipment home; arrange for shipping.
- Inventory all equipment rented locally, and supervise supplier pickup.
- Review final bill with accounting, and make required payments on uncontested portion of bill.

Notes: ____________________________