

Section and Committee Meeting Checklist



Date: June 26, 2018

CBA Events Contacts:

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Online Leadership Resources Link:

<https://ctbar.site-ym.com/?page=LeadershipResources>

Yearly Program Planning (July/August)

- _____ Select a topic for each meeting.
- _____ Select meeting dates and venue(s). Check the calendar to ensure that date(s) don't conflict with holidays. Check the CBA [online calendar](#) to ensure that the date doesn't conflict with major CBA meetings. Submit meeting schedule to CBA.
- _____ Contact potential speakers.
- _____ Create a blurb for marketing your program that articulates meeting outcomes (what do you want to accomplish; why should people attend).

Logistics Planning (July/August)

- _____ Plan logistics with the CBA event staff (room setup, food and audiovisual equipment)
- _____ Determine what materials and services you will need from outside vendors. (signs, awards or plaques, entertainment; and attendee giveaways, etc.).
- _____ Finalize the budget and timeline.
- _____ Work with the CBA marketing staff to recruit and secure sponsors, if necessary.

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Meeting Development

Four Weeks Out

- _____ Submit information for meeting notice to CBA using the online [Section/Committee Meeting Form](#), or if requesting CLE for your meeting, please fill out the online [Section Meeting CLE Credit Request Form](#).

Three Weeks Out

- _____ Contact speakers to discuss their presentations and see if they need additional information or support.
- _____ Promote event to colleagues

Two Weeks Out

- _____ Make staff assignments (including registration staff, recording of meeting minutes, audiovisual coordinator, and speaker greeter) and explain duties to all staff members.
- _____ Promote event to colleagues

One Week Out

- _____ Verify venue details with CBA event staff such as audiovisual needs and room layout as well as any special instructions.
- _____ Send meeting reminder to section
- _____ Contact speakers to make sure that they have the correct date and location of the event, as well as the time they are expected to speak. Give speaker(s) the name of a contact person who will greet them upon arrival.
- _____ Request name tags from CBA event staff, if applicable.

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Meeting Implementation

The Day Before

- ___ Touch base with speaker(s) for any last minute needs.
- ___ Touch base with those who have been given staff assignments to ensure they are all set (including registration staff, recording of meeting minutes, audiovisual coordinator, and speaker greeter).
- ___ Pack an "emergency kit" with any miscellaneous materials you may need (registration list, pens, pencils, paper, phone numbers of speakers, etc.).

Day of

- ___ Arrive early and check that the location is set up correctly and that audiovisual equipment is setup as requested. Check all microphones, projectors, audio equipment, and computer connections.
- ___ Check the registration area. Make sure name tags and supplies are plentiful. Plan to have officers at registration approximately a half-hour before the start of the event.
- ___ Allow time for run-throughs if requested by your speakers.
- ___ Make sure that signs directing people to the event are posted, if applicable.
- ___ Introduce the program and the speakers, and facilitate the question-and-answer period.
- ___ Welcome new members

After the Event

- ___ Take time to say "Thank you" and celebrate your success with your partners.
- ___ Conduct wrap-up meeting with planning committee.
- ___ Prepare written summary and evaluation of event.
- ___ Send thank-you cards and notes of appreciation to committee members, volunteers, presenters, sponsors, staff members, and others involved with the event.
- ___ Send meeting minutes to CBA for posting on your section web page.
- ___ Send registration list with walk-ins and any money to CBA within 24 hours of the event.