Regional Meeting Planning Committee Checklist Guide

Not all items on this checklist will be applicable to your region. Additionally, your region/district may have events not covered on this list. This checklist is intended as a guideline.

**Budget**

*Ahead of meeting:*
- Draft budget for event
  - Determine pricing for attendee and vendor registration
  - Determine budget for Food & Beverage costs, typically in conjunction with contract negotiation with hotel
- Monitor income expenses monthly

**Conference Program**

*Ahead of meeting:*
- Draft program agenda framework
- Open Call for Presentations
- Identify any Keynote Speakers
- Identify educational sessions and presenters
  - Confirm participation of all speakers
- Prepare a conference agenda suitable for printing

*Onsite:*
- Monitor session rooms for any issues
- Coordinate volunteers for session moderators, etc.
- Optional: Collect PowerPoint presentations for distribution to conference attendees

**Volunteers**

*Ahead of meeting:*
- Issue call for volunteers. Potential areas of need include:
  - Registration table
  - Session moderators
  - Silent Auction/Raffle
- Exhibit/Vendor Show
- New Attendee Orientation

- Prepare tentative volunteer work schedule and notify volunteers ahead of meeting

**Onsite:**
- Assign duties to volunteers as needed
- Make sure scheduled volunteer is in place or make arrangements for a backup

**Session Moderators**

**Ahead of meeting:**
- Prepare document for each moderator OR each room that includes the introductory bio of the speaker and any other notes the moderator should tell the audience (i.e. fill out evaluations, etc.)

**Onsite:**
- Make sure moderator packets are in each room
- Make sure moderator knows who to call in case of A/V issues

**Registration**

**Ahead of meeting:**
- Identify volunteers and NAEP staff who will work the registration table and hours needed
- Order from the hotel:
  o Table/designated area for registration
  o Order power and/or internet access for registration table (ideally hard line)
  o Identify who will handle cash (and keep cash after hours – ideally treasurer, if attending)

**Onsite:**
- Unpack and organize shipment/registration boxes to include bags, lanyards, inserts, badges and badge holders.
- Stuff bags/folders with any registration inserts/materials OR have a plan to hand out as each attendee arrives OR allow attendees to self-select
- Distribute badges and registration materials to attendees and exhibitors as they arrive
- Process additional payments (paying onsite/paying for additional items or tickets, etc.)
- Process on-site attendees, if your meeting is allowing day-of registration
- Keep all cash and financial data secure
• Close registration each day. All vital material (laptops, printers, financial data, etc. should be secured either in a staff office or in designated persons’ hotel room).

**Meeting Materials**

**Ahead of meeting:**
Order or source all meeting materials, some of which may be (or come from) sponsors:
- Name badges and lanyards
- Conference bags
- Optional items like pens and notepaper, etc.
- Optional speaker gifts

Order any awards that will be presented such as Distinguished Service awards (Note, NAEP provides an award for the outgoing regional president)

**Onsite:**
- Distribute bags

**Signage/Printed Material**

**Ahead of meeting:**
- Identify a printing office (ideally on a campus of a planning committee member) to print any signs and banners needed
- Designate a committee person to design signs (word documents are fine).
  - Check to see if hotel has electronic reader board. This will eliminate need to print session-specific signage for each meeting room
- Design and print a program (MS Word document is fine)

**Onsite:**
- Place signs at appropriate locations
- Designate one person to place signage throughout the event
- Use hotel business office to make and print any last minute updates as needed

**Auction/Raffle**

**Ahead of meeting:**
- Solicit donations from vendors
- Decide location and hours of event
- (NAEP can provide bid sheet template)

**Onsite:**
- Set up auction or have raffle tickets at registration/with designated volunteers
- Set up any logistical details (bid sheets, bags or cups to collect tickets, etc.)
- Announce winners and distribute prizes
**New Attendee Orientation**

**Ahead of time:**
- Plan orientation session outline
  - Welcome from regional leadership as well as NAEP
  - Can include icebreaker/get to know you game
  - Where are the sessions/events

**Evening Events:**

**Onsite:**
Collect tickets, if using, for entrance to evening/off site events (or have a monitor watching for the correct badges, especially if other organizations have meetings at the same hotel)
If going offsite, designate one person to coordinate with hotel, bus company, off-site venue, etc.

**Exhibit Hall/Vendor Management**

**Ahead of the event:**
- Assign exhibit booth space. Notify exhibitors of booth space and set up/tear down hours
- Notify exhibitors of any additional form for electricity and internet access
- Notify exhibitors if they need to purchase tickets for additional meal options

**Onsite:**
- Greet/welcome exhibitors. Exhibitors should check in at registration for name badges
- Designate volunteer/program committee member to interact with the exhibit booth management company (either from the hotel or third party). The management company will handle all vendor issues including lost/misplaced shipments
- If exhibitors are holding raffles at their booth, help publicize
- Send attendee list to exhibitors after the show

**Hotel: Meeting Space**

**Ahead of the event:**
- Negotiate contract with hotel for room nights and meeting space
- Decide on room seating set up
  - Identify any attendee ADA accommodations (from registration list)
- Decide on A/V needs (and A/V company)
  - Any internet service needed
  - Projector, microphones, etc. (if presenters are to bring their own laptops, be sure to notify them ahead of time)
- Decide on Food & Beverage (F&B) menu
  - Identify any food allergies/special request (from the registration list)
Let hotel know final counts for all F&B functions

Onsite:
- Designate one committee person to be in charge of F&B issues. This person should be the only person to agree to add more coffee to a break, etc., or to add extra seating or update any confirmed count to the hotel
- Designate one person to coordinate all onsite A/V issues. This person is the liaison with the A/V company for any technical assistance needed
- Designate one person for hotel room issues – temperature, overflow seating, water refresh, etc.

Hotel: Sleeping rooms

Ahead of meeting:
- Compare hotel rooming list with registration list for attendees and exhibitors

Onsite:
- Review any reports provided by hotel regarding sleeping rooms (no-shows, etc.)

Evaluation Forms

Ahead of meeting:
- Create evaluation forms for each educational session and overall meeting. Either print forms or design in a free survey tool of your choosing

Onsite:
- Distribute and collect evaluation forms. If printed, a volunteer or moderator should distribute appropriate form during each session. General evaluation forms can be distributed (and collected) at registration

Regional Business Meeting

Ahead of meeting:
- Consult region bylaws for any action to be taken at the business meeting
  - Nomination and/or elections of candidates for regional offices
  - Nomination and/or elections of candidates for the District representative to the national board of directors.