

Annual Meeting Checklist

By Jake R Brady

- ☐ Preparation
 - ☐ Read through annual meeting requirements.
 - ☐ Locate last year's annual meeting files.
 - ☐ Determine what type of event it will be.
 - ☐ Set up teams and give each team a written list of responsibilities and deadlines.
 - ☐ Review the annual meeting budget.
 - ☐ Set your annual meeting date, time, place, agenda.
 - ☐ Prepare an action plan with an itemized list of meeting preparations.
 - ☐ Schedule regular check-in meetings to follow up on the progress.
 - ☐ Prepare promotional materials or supplies.
- ☐ Meeting Space and Arrangements
 - ☐ Locate a facility for the meeting.
 - ☐ Send a request for proposal outlining the requirements of your meeting.
 - ☐ Do a site inspection and meet with the property's convention services planner.
 - ☐ Ask what menu items can be done well for your meal budget.
 - ☐ Ask about hidden charges such as gratuities, service charges, setup fees, etc.
 - ☐ Make sure you have a written contract that outlines the specifications, date, costs, method of payment, and cancellation policy.
 - ☐ Ask when the site's program coordinator for the event will arrive to check on last-minute details.
 - ☐ Be certain the hotel or meeting room will be open early enough for you to set up and check everything before the meeting.
 - ☐ Know where light switches are and how to operate them if you plan to show a video or PowerPoint presentation.
 - ☐ Arrange for greeters to welcome members as they arrive.
 - ☐ Obtain speakers, videos and other aids needed to produce an interesting, educational, and entertaining program.
- ☐ Marketing your event
 - ☐ Prepare and mail official notices to members.

- ☐ Write articles and prepare ads and sponsor newsletters.
- ☐ Add annual meeting information to your website.
- ☐ Send announcements.
- ☐ Hang posters, signs, or banners in your lobby.
- ☐ Use drive-up envelopes with annual meeting information.
- ☐ Send reminder postcards two weeks before the meeting.
- ☐ Send notices to newspapers for the special event section.
- ☐ Meeting
 - ☐ Be sure to start the meeting on time.
 - ☐ Use your annual meeting as a marketing opportunity for showcasing your products and services.
 - ☐ Hand out annual reports to all attendees.
 - ☐ Have a photographer record highlights for your newsletter, bulletin boards, and web site.
 - ☐ Hire a professional stenographer to take meeting notes.
 - ☐ Prepare board chair and other committee representatives for presenting their reports.
 - ☐ Highlight positive achievements.
 - ☐ Be open and honest about any difficult issues.
 - ☐ Allow adequate time for food functions.