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.

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☐ 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.

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