

# 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.