

Meeting Preparation Checklist

This planning involves the specific preparation of meeting facilities, participants' materials, meals, and all the other mechanics involved in preparing for a worthwhile meeting.

- Has a good agenda been prepared and a copy sent to each program participant?
- Invocation? Who?
- Opening remarks? Who? Time?
- Register of attendance? Who? How?
- Each report, activity and transaction? Who? Time?
- Closing time set?
- All involved told they will be limited to the time specified? (One of the best means of cutting attendance in the future is to allow the meeting to run overtime.)
- Does the meeting require any special funding?
- Will reservations be needed?
- Who will they be sent to?
- What's the deadline?
- Have all the necessary facilities been *arranged*?
- Room engaged?
- Cost determined?
- Confirmation in writing?
- Public address system set up if needed, and tested?
- Sufficient chairs and tables already arranged? (Don't waste time later.)
- Education aids needed?
- Checked with instructor on his/her needs?
- Light switches and electrical outlets located?
- Extension cords? Ash trays? Matches?
- Heating, cooling and ventilation all available and operation understood?
- Clean-up crew to square things away after it's over?
- Will refreshments or a meal be served?
- Menu selected?
- Cost determined, including tax & tip?
- Refreshment breaks planned?
- Have all the officials of all the credit unions in the Chapter been informed?
- Has a notice been mailed to each credit union?
- Have telephone calls followed up with certain persons (those who would be most likely to benefit from this particular meeting)?
- Will there be personal follow-up by a few officials where convenient?
- Does the notice tell: Where? Why? Who? How to get there if place is different? A promised time that the meeting will begin and end?
- Has publicity been released?
- Credit union newsletters?
- Local newspapers (just the facts, ma'am, with lots of names)?
- Radio and TV news releases?

- Are special guests and instructors or speakers expected?
- Who will meet the people?
- Who will introduce them?
- Names and titles pronounced correctly?
- Biographical information assembled if needed and approved by the individual?
- Have reminders been sent 30 days in advance?
- Have you followed up with a phone call?
- Will special arrangements be made for out of town persons? Who will do it?
- Will prizes or awards be ready if they are to be given out? (Time saving procedure.)
- Will you seek evaluation of this meeting from those attending? How?