Check List: Meeting Logistics

	Meeting Logistics
	• Name of meeting.
	• Meeting date(s), including travel days.
	• Clearly articulated objectives, i.e. desired and realistic outcomes of the session
	• Who should be invited? Why is it important that these individuals attend versus others? » Confirmation of attendance Once invitation has been sent to attendees - within a 2-week period after the invitation, a "confirmation" e-mail should be sent out to attendees, welcoming them to the meeting, confirming their attendance, providing an agenda (can be draft form) and a brief confirmation on logistics, e.g., whose responsibility it will be to book air travel, hotel and ground transportation (attendees need to be clear on who does what regarding meetings; and each meeting tends to be a little different).
	• Agenda of the meeting.
	• Pre-work / pre-reading.
	• Vendor list: Create a list of all vendors that you will be working, with including e-mails, addresses and telephones numbers (both office and cell phone). Keep on hand in pre-planning and on-site for easy reference. Ensure vendors have your contact information (including cell #).
	• **Venue:**
	» Off-site or on-site: name of venue, address, URL, contact information
	» Hotel Concierge - Introduce yourself to the Hotel Concierge as you arrive at the hotel; they are a great resource.
	» VIPs at meeting – Let hotel staff know the names of the person hosting the meeting and any others who are co-hosts and those who are meeting-owners (e.g., people who staff can go to when they have questions or need paperwork signed)
	» Ground transportation (e.g. shuttle) from hotel to meeting location
	» Main meeting room: name, size and set-up
	» Break-out room(s): number of rooms, name(s), size and set-up, proximity to main room
	» Signage at venue - Ensure signage is well placed at the venue. Walk the meeting space with the event manager prior to the meeting to discuss signage placement.
	» Registration on-site at the meeting – Ensure registration staff arrives 45 minutes prior to arrival of attendees. Provide coffee / pastries / water. Ensure clear signage at registration. Determine how registration will flow to allow attendees to be ready for their meeting at least 15 minutes prior to start time.
	» Catering requirements, including special dietary considerations, contact person » Breakfast - If you plan to provide breakfast each day, ensure via pre-meeting communication - that attendees are aware (to avoid having individuals order expensive room service).
	» Audio-visual requirements and contact person
	» IT at venue - Confirm with IT staff time of set up (especially on the first day of the event, but beyond that date as well) as IT will need to arrive in plenty of time prior to start of meeting.

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	• **Venue:** ***(cont'd)***
	» Wireless Internet access in meeting rooms – Generally, not a good idea. It is better to book a separate meeting room where, if attendees must check mail, etc., they can do so, without distracting those in the meeting room. Also, ensure proper set-up, e.g., enough IP addresses for attendees. Also, set expectations prior to the meeting, e.g., if you want to use wireless, it is available in the XYZ Lounge, directly across from the main meeting room. Most hotels now have free wireless.
	» Special needs requirements, e.g. language translations, cultural sensitivities
	» Accommodation for group members with physical, sensory or mental challenges
	» Kinko's / Fed-X / UPS - Locate the closest Fed-X, UPS (copy store) to the meeting venue. Hotel business offices are fine for small tasks, but can be costly when making multiple copies.
	» Extra Supplies **-** for the meeting planner, especially if the meeting is local. Always bring a box of extra supplies, e.g. extra office stationery goods, aspirins, band-aids, etc., those items that, for whatever reason, people tend to ask for....
	• **Welcome package:**
	» Welcome letter
	» Welcome gift, other items
	» Pre-work / pre-reading (to be completed the evening before the meeting)
	» Delivery: to hotel room prior/after check-in; at check-in; at meeting
	• **Departure package:**
	» Copy of leave-behinds (paper, USB drive, other)
	» Thank you gift
	» Delivery: at close of meeting; sent out after meeting; delivered to office/home
	• **Guest room reservations:**
	» Name of hotel (if different than meeting location)
	» Block reservation / Special price per room / deadline for special price, etc.
	» Hotel confirmation #'s – If working with the hotel on a room block, send out individual confirmation #'s to attendees as soon as possible. The hotel can easily provide confirmation #'s within a few days once the room block is closed.
	» Type, quantity of rooms; any special needs requirements?
	» Client master billing, or individual credit cards, or a combination
	» Which expenses are considered "business" versus "personal"?
	• **Evening or leisure-time activities:**
	» Optional or mandatory
	» Logistics, and any additional information

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	• **Travel to/from meeting location:**
	» Transportation arrangements (flights, trains, ferries, etc.)
	» Flight itineraries - It is optimal to have attendees flight information: ***1)*** as a security precaution, it is always best to know what flights people are traveling on; ***2)*** if someone needs assistance or must depart early or arrive late to the meeting, it is best to be aware of the conflict in advance.
	» Ground transportation options (e.g. taxi, public transit, car service), including driving directions
	» Other
	• **Attire:**
	» Meeting: Formal business; business casual; informal (jeans are OK – no work-out wear); etc. » (NB: Air-conditioned meeting rooms can be chilly. Dress in accordance for your comfort.)
	» Evening, other
	• **Weather:**
	» Weather forecast and/or seasonal average temperatures (daytime highs and evening lows)
	• **Detailed logistics information:**
	» Day-by-day logistics – includes most items listed above
	• **Contact person(s) for queries:**
	» Name(s), phone/cell number, e-mail address, etc.