

Meeting Checklist

1. Publicity/Promotion/Notifying

Who Is Responsible

By When

- | | | |
|--|-------|-------|
| <input type="checkbox"/> notices – to whom | _____ | _____ |
| <input type="checkbox"/> letters of invitation | _____ | _____ |
| <input type="checkbox"/> directions to meeting place | _____ | _____ |
| <input type="checkbox"/> phone calls/emails | _____ | _____ |
| <input type="checkbox"/> news releases | _____ | _____ |
| <input type="checkbox"/> contact with the media | _____ | _____ |
| <input type="checkbox"/> copies of speeches | _____ | _____ |
| <input type="checkbox"/> copies of meeting plan | _____ | _____ |
| <input type="checkbox"/> pictures/photographs | _____ | _____ |
| <input type="checkbox"/> bulletin boards | _____ | _____ |
| <input type="checkbox"/> personal contacts | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

2. Agenda and Resource Materials

Who Is Responsible

By When

- | | | |
|---|-------|-------|
| <input type="checkbox"/> copies of agenda | _____ | _____ |
| <input type="checkbox"/> contact people on the agenda | _____ | _____ |
| <input type="checkbox"/> materials needed (e.g., reprints) | _____ | _____ |
| <input type="checkbox"/> previous minutes | _____ | _____ |
| <input type="checkbox"/> committee reports | _____ | _____ |
| <input type="checkbox"/> previous agreements and time commitments | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

4. Meeting Space Check

Who Is Responsible

By When

<input type="checkbox"/> size and shape of space	_____	_____
<input type="checkbox"/> electrical outlets	_____	_____
<input type="checkbox"/> mike outlets	_____	_____
<input type="checkbox"/> acoustics	_____	_____
<input type="checkbox"/> doors	_____	_____
<input type="checkbox"/> bathrooms (where, number can accommodate)	_____	_____
<input type="checkbox"/> stairs	_____	_____
<input type="checkbox"/> elevators	_____	_____
<input type="checkbox"/> heat/cold regulation	_____	_____
<input type="checkbox"/> ventilation	_____	_____
<input type="checkbox"/> parking facilities (cost, number, access)	_____	_____
<input type="checkbox"/> registration area	_____	_____
<input type="checkbox"/> location	_____	_____
<input type="checkbox"/> transportation, access to facility	_____	_____
<input type="checkbox"/> room setup arrangements	_____	_____
<input type="checkbox"/> access to meeting room(s)	_____	_____
<input type="checkbox"/> lighting	_____	_____
<input type="checkbox"/> name of custodian/engineering, where to be reached	_____	_____
<input type="checkbox"/> telephone access for messages and calling out	_____	_____
<input type="checkbox"/> exhibit space	_____	_____
<input type="checkbox"/> wall space for newsprints, etc.	_____	_____
<input type="checkbox"/> emotional impact (color, aesthetics)	_____	_____
<input type="checkbox"/> room-darkening possibilities	_____	_____
<input type="checkbox"/> areas for disabled	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

5. Equipment for Meeting

Who Is Responsible

By When

<input type="checkbox"/> tables (number, size, shape)	_____	_____
<input type="checkbox"/> chairs (comfort, number)	_____	_____
<input type="checkbox"/> microphones	_____	_____
<input type="checkbox"/> audiotape recorder	_____	_____
<input type="checkbox"/> audiotape cassettes	_____	_____
<input type="checkbox"/> extension cords	_____	_____
<input type="checkbox"/> newsprint easel (chart stand)	_____	_____
<input type="checkbox"/> projector	_____	_____
<input type="checkbox"/> chalkboard, chalk	_____	_____
<input type="checkbox"/> chalkboard eraser	_____	_____
<input type="checkbox"/> typewriters	_____	_____
<input type="checkbox"/> waste baskets	_____	_____
<input type="checkbox"/> bulletin boards	_____	_____
<input type="checkbox"/> computers	_____	_____
<input type="checkbox"/> projection table(s)	_____	_____
<input type="checkbox"/> flannel board	_____	_____
<input type="checkbox"/> easel	_____	_____
<input type="checkbox"/> projector	_____	_____
<input type="checkbox"/> screen	_____	_____
<input type="checkbox"/> platform	_____	_____
<input type="checkbox"/> CD/DVD player	_____	_____
<input type="checkbox"/> CD/DVD discs	_____	_____
<input type="checkbox"/> gavel	_____	_____
<input type="checkbox"/> coffee, tea dispensers	_____	_____
<input type="checkbox"/> water pitchers	_____	_____
<input type="checkbox"/> cups	_____	_____
<input type="checkbox"/> camera	_____	_____
<input type="checkbox"/> transparencies and appropriate pens and grease pencils	_____	_____

6. Materials and Supplies for the Meeting

Who Is Responsible

By When

<input type="checkbox"/> name tags/name tents	_____	_____
<input type="checkbox"/> small tip felt pens	_____	_____
<input type="checkbox"/> large tip felt pens	_____	_____
<input type="checkbox"/> masking tape	_____	_____
<input type="checkbox"/> paper clips	_____	_____
<input type="checkbox"/> crayons	_____	_____
<input type="checkbox"/> pins	_____	_____
<input type="checkbox"/> scissors	_____	_____
<input type="checkbox"/> stapler	_____	_____
<input type="checkbox"/> glue	_____	_____
<input type="checkbox"/> newsprint paper	_____	_____
<input type="checkbox"/> scratch paper	_____	_____
<input type="checkbox"/> pencils	_____	_____
<input type="checkbox"/> copies of previous minutes	_____	_____
<input type="checkbox"/> copies of reports	_____	_____
<input type="checkbox"/> books	_____	_____
<input type="checkbox"/> visual aids	_____	_____
<input type="checkbox"/> colored paper	_____	_____
<input type="checkbox"/> pamphlets	_____	_____
<input type="checkbox"/> display materials	_____	_____
<input type="checkbox"/> flowers or flower arrangements	_____	_____
<input type="checkbox"/> decorations	_____	_____
<input type="checkbox"/> posters	_____	_____
<input type="checkbox"/> instruction sheets	_____	_____
<input type="checkbox"/> résumés of resource people	_____	_____
<input type="checkbox"/> directional signs (to meeting)	_____	_____
<input type="checkbox"/> chalk (various colors)	_____	_____
<input type="checkbox"/> file folders	_____	_____

7. Budget*

Expenses

Estimated Cost

___ mailing and stamps	_____
___ telephone calls	_____
___ telephone conferences	_____
___ rental of equipment	_____
___ rental of space	_____
___ paper materials	_____
___ name tags	_____
___ newsprint	_____
___ paper	_____
___ construction paper	_____
___ writing materials	_____
___ pens	_____
___ markers	_____
___ grease pencils	_____
___ secretarial/computer time	_____
___ transportation	_____
___ meals	_____
___ bar _____	_____
___ coffee, tea, juice	_____
___ reproduction of materials	_____
___ folders	_____
___ tapes	_____
___ operator of multimedia equipment	_____
___ operator of sound equipment	_____

*Some of these will not be budget expense items for some planners.

7. Budget

Expenses (cont.)

Estimated Cost

___ speaker fees	_____
___ consultant fees	_____
___ entertainment	_____
___ flowers	_____
___ _____	_____
___ _____	_____
___ _____	_____
___ _____	_____

Income

Estimated

___ registration fees	_____
___ sale of materials	_____
___ grants	_____
___ sale of meal tickets	_____
___ donations	_____
___ membership fees	_____
___ coffee and tea charges	_____
___ in-kind bartering	_____
___ _____	_____
___ _____	_____
___ _____	_____
___ _____	_____

9. At the Meeting

Who Is Responsible

- ___ meeting, greeting, seating of participants and guests _____
- ___ documentation – recording _____
- ___ greeting of latecomers _____
- ___ evaluation activities _____
- ___ handing out materials _____
- ___ operation of equipment _____
- ___ process review, stop sessions, etc. _____
- ___ announcements _____
- ___ _____
- ___ _____

10. End of Meeting – And After

Who Is Responsible

By When

- ___ collect unused materials _____
- ___ return equipment _____
- ___ clean up _____
- ___ thank helpers _____
- ___ read and analyze evaluation/feedback _____
- ___ prepare feedback on feedback _____
- ___ mail follow-up materials _____
- ___ remind people of their follow-up commitments _____
 - phone _____
 - email _____
 - write _____
- ___ lay plans for next meeting dates, if planned _____
- ___ pay bills _____
- ___ collect outstanding monies _____
- ___ follow-up phone calls _____
- ___ reports _____
- ___ thank-you notes _____
- ___ _____

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