

Meeting Planning Guide

1. Profile your audience

- Identify primary audience (members, students, those directly involved with topic)
- Identify secondary audience (general public, tertiary organizations)
- Identify partner audiences (vendors, sponsors, collaborative groups)
- From where will your audience geographically originate? (determines need for lodging, transportation, etc.)
- What is the average age of expected audience? (helps in planning for special needs, accessibility, transportation, on-site logistics, etc.)

2. Determine meeting needs and tentative schedule

- Determine length of meeting
- Decide upon days of the week
- Set meeting dates – CONTACT REED COLLEGE!
- Double-check for conflicts or collaborations:
 - Are similar events being planned for the same dates? (conflict)
 - Are similar or activity events being planned around the same dates? (collaborative/tie into)
 - What other organizations are meeting in the facility?
- Plan housing arrival & departure dates
- Determine if transportation is needed for participants within registration fees
- Event Schedule:
 - General or Plenary session (s)?
 - Keynote?
 - Workshops? Breakouts? Track sessions?
 - Poster sessions?
 - Exhibitors? Book/goods sales?
 - Meals and refreshment breaks?
 - Concessions?
 - Receptions?
 - Special event? (banquet, awards, etc.)
 - Entertainment?
 - First-timers' event/reception?
 - Hospitality suites?
 - Conference office?
 - Registration area?
 - Pre- or Post- conference workshops?
 - Pre-, Post- or During- conference activities or tours?
 - Childcare?
 - Spouse/Guest activities?
 - Service project component?

3. Create preliminary budget

- Identify all expenses
 - Mailing & postage
 - Printing
 - Signage
 - Decorations

- Web site
- Web registration - fees
- Speakers' fees
- Extra helpers
- Transportation
- Entertainment
- Meeting room space
- Exhibits
- Exhibit space
- Meals
- Beverages & snacks
- Name badges
- Registration packets
- Promotion items
- Gratuities
- VIP basket/gifts
- Attendee welcome gifts
- Other _____

- Identify all income
 - Registration fees
 - Member assessments
 - Override on functions
 - Contributions and/or sponsorship
 - Advertisements in programs
 - Exhibit space rental
 - Grants
 - Other _____

- Accounting
 - Establish budget tracking system
 - Audit master account billing
 - Reconcile final billing
 - Prepare budget/actual expenditure recap

4. Select facilities and services

- Meeting Room Needs:

The type of room you choose can determine the flow and educational quality of the meeting. Consider what people are learning, how they are learning, and what type of set up can help attendees get the most from the meeting (discussion, hands-on education, note-taking, networking, etc.)

Another factor to consider is a/v equipment. Be sure to arrange the seating to be conducive for watching and participating in presentations with a/v. Consider:

- Size of room
- Capacity and configuration
- Lighting
- Acoustics and/or sound system
- Proximity to other sessions/events
- Ventilation/temperature
- Obstructions, ceiling height
- A/V capacity, Internet & phone connectivity
- Accessibility for disabled (to room, within room, and to restrooms or rest of conference)

- Determine size of main meeting room based on anticipated number of attendees in general session
- Identify need for other meeting rooms (breakouts, workshops, board meetings, hospitality suites)
- Determine room set ups to be used
- Determine cost of meeting rooms

- Reserved, accessibility or VIP seating for general sessions?
- Hearing impaired devices or interpreters needed?

- Exhibit Space:
 - Power hookups
 - Internet access
 - Phone line access
 - A/V equipment
 - Access to room (loading & unloading for exhibitors – open times of room, use of elevator, etc.)
 - Drayage/Storage/Decorating/Services

 - Organize exhibit space into booths and number
 - Establish exhibitor policies and cost
 - Establish exhibitor days and hours
 - Establish set-up and tear-down hours
 - Prepare exhibitor contracts
 - Prepare exhibitor solicitation materials
 - Mail to potential exhibitors
 - Reserve storage space for advance shipments
 - Arrange freight shipping and receiving
 - Obtain insurance/determine liability
 - Arrange food & beverage services for exhibitors
 - Arrange incentives/pampering for vendors (relaxation area, massage table, break service, etc.)

- Lodging
 - Contact CEP for campus housing availability and rates
 - Contact CEP for local hotel price bids and Reed rates
 - Choose properties based on your needs (location, price, amenities, service, etc.)
 - Obtain room block commitments
 - Determine reservation policy
 - Set date for reservation cut-off
 - Establish deposit policy
 - Confirm check-in/out times
 - Design reservation form
 - Send information to attendees
 - Arrange VIP accommodations
 - Reserve hospitality suites
 - Determine master account procedures and decide on signature authorization
 - Does the facility have adequate parking?

- Transportation
 - Obtain schedules and /or group reservations for air and ground transportation (buses, mass transit, cabs and rental cars)
 - Arrange for airport-to-facilities transportation (or information)
 - Arrange for hotels-to-facilities transportation (or information)
 - Arrange for transportation to functions (or information)
 - Mail shipping instructions to visitors
 - Mail directions and maps to visitors

- Programming
 - Outline specific programs
 - Establish themes for individual conference events (awards banquet, etc.)
 - Decide on entertainment
 - Select speakers and presenters
 - Determine a/v requirements of speakers, presenters and entertainers

- Food & Beverage
 - Call Bon Appetit for catering price bids and menus
 - Determine number of meals to be held at meeting facility or other venues
 - Select locations
 - Will meals be served, buffet, box or reception?
 - Estimate attendance at each meal function
 - Do your attendees have any dietary needs or restrictions?
 - Select menus
 - Obtain costs
 - Select wine (if desired)
 - Decide on host or no-host bar (if desired)
 - Decide on ticket system for meals and cocktails (if desired)
 - Arrange for additional service personnel
 - Determine food & beverage requirements for hospitality suites

- Activities
 - Will you offer pre-, during- or post- conference activities or tours?
 - If so, decide on activities
 - Reserve outdoor functions (golf, skiing, tennis courts, etc.)
 - Plan & organize tours and sightseeing, including reservations and transportation
 - Organize companion / guest activities
 - Arrange for children's activities and /or care

- Security
 - Determine security requirements for VIPs, exhibits, meals, outside functions, attendees, and goods
 - ✓ Have there been any recent threats to VIPs?
 - ✓ Will the VIP be bringing personal security?
 - ✓ Is the educational content of _____ nature?
 - ✓ Do you anticipate picketing or other public demonstration?
 - ✓ Will you be serving alcohol at events?
 - ✓ Do you need a locked area for goods or supplies?

- Create medical emergency plan
 - Disaster emergency plan
 - ✓ Notify attendees of exits in rooms, building, as event begins
- Registration
- Set registration policies
 - Define registration procedures. Who will gather and process registrations? Via mail, email, phone or web? Will you accept checks, or credit cards?
 - Create necessary forms
 - Develop website for on-line registration
 - Arrange for registration areas in meeting facility
 - Organize registration system and personnel needs
 - Determine hours of operation for on-site registration
 - Obtain equipment, supplies and signage for registration area
 - Order phones, pagers, radios, computers, printers, and credit card machines, etc.
- Day-of Registration Area
- Computer & printer for registrant checklist or on-site registration
 - Attendee lists
 - Registration packets
 - Extra packets and nametags for on-site registration
 - Till/cash box/credit card machine for on-site registration
 - Portland/NW area information
 - Maps (of Portland and Reed)
 - Restaurant guide
 - Information about Reed
 - Message board for attendees (could also be in hospitality area)
 - Phone (could also be in hospitality area)
- Registration Packets *Be sure to include:*
- Name badges
 - Conference schedule with meeting room locations
 - Tickets for events (meals, tours, bar service, door prizes, etc.)
 - Map of facilities
 - Activities schedule
 - Portland information
 - Transportation information
 - List of attendees and exhibitors
 - List of sponsors
 - Giveaways (if applicable)
 - Promotions from your organization
- Arrival Reception
- Plan airport greetings
 - Arrange airport transportation (or information)
 - Establish VIP protocol
 - Create host committees
 - Order special gifts, flowers, etc. for VIPs
 - Order in-room welcome gifts for attendees

- Signage
 - To Reed
 - Sandwich boards directing to event (once on campus)
 - Signage on campus
 - Signage at meeting room
5. Finalize budget
- Determine registration fees based on prices from selected facilities, services, and other expenses
 - Set up master accounts
 - Establish deposit policies
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6. Finalize schedule & speakers
- Does speaker need or prefer:
 - A/V equipment?
 - Internet connection?
 - Lapel or podium microphone?
 - Green room?
 - Choose people to host and buddy with speakers during conference
 - Determine who will introduce keynote speakers
 - Choose emcee(s) for special events
7. Promote event to attendees and partners
- Create website and web registration, with links for lodging and tour registration (if applicable)
 - Produce pre-meeting publicity releases
 - Produce pre-meeting advertisements
 - Produce pre-meeting announcements and pre-registration mailers
 - Make initial and follow-up mailings
 - Take advantage of promotional material and mailing assistance available through Portland Oregon Visitors Association
- Publicity:
- Contact local media: newspaper, radio, TV stations, magazines, newsletters
 - Prepare news releases for trade media and local media
 - Arrange for photographers for on-site key events (awards banquets, etc.)
 - Set up media room if necessary
 - Produce publicity kits
- To Attendees – Pre-Registration Information:
 - Name of meeting facility
 - Name(s) of hotel(s) and reservation information
 - Pre-, During- and Post- Activities
 - Maps and directions to meeting facility and hotel(s)
 - Conference schedule
 - Description of speakers

- Information about Portland/NW region
- Transportation information
- Childcare information
- Guest information
- Registration application with prices
- Ask for special needs requirements, and dietary requirements/restrictions

- To Attendees – Upon-Registration Information:

- Schedule with detailed programming
- Lodging/Hotel information (room block, cut-off date, contact info, price, directions)
- Transportation information
- Pre-, During- and Post- activities
- Companion/Guest activities
- Companion/Guest registration and meal registration
- Maps and directions
- Shipping: information on shipping instructions
- Appropriate attire for weather and for each function

- To Vendors, General Promo Information:

- Conference information
- Exhibitor registration form (cost & size of booth, date & times of exhibit hall, profile of conference & attendees)

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- Shipping: information on shipping instructions

8. Coordinate meeting logistics

- A/V Equipment

- Arrange for A/V equipment
- Arrange for recording equipment if needed (if recording, be sure to obtain written permission from speaker)
- Special lighting or sound required? (for speaker or entertainment)

9. Day before and day of event

- Pre-Conference Meeting with facility and service providers
- Give detailed schedule to: facility coordinators, hotel front desk, transportation providers, caterer
- Do final walk-through of facility, with setup
- Bring meeting survival kit

- Setup office and registration

10. Post event

- Post-Conference meeting with committee and service providers (if applicable)
 - Share pros and cons
 - Review billing
 - Document suggested changes for next year
 - Determine dates for next year
- Final accounting
- Final statistics
- Thank yous to appropriate people
- Pass information to next year's conference chair/host location