

Meeting Planning Timeline

1) Six to 12 months out: once you decide to have meeting

- **Determine who will attend, including local guests and VIPs.**
- **Select several possible meeting dates and sites.**

Be sure to keep in mind national and local holidays, events, weather conditions and accessibility issues. For example, you might not want to have a meeting in Philadelphia at the same time as the Republican National Convention.
- **Contact hotel/conference centers and visit relevant Web sites.**

For instance, plansoft.com provides virtual tours of hotels.
- **Visit potential sites.**

Consider distance from airport, shuttle service and parking options, including accessible transportation options and accessible parking.
- **Select potential sites and, if feasible, obtain referrals.**
- **Select a destination and facility.**

2) Four to six months out

- **Inform potential attendees of the meeting's date and location via brochure, letter or e-mail. Announcements and registration forms should advise individuals to self-identify any special needs in advance, including but not limited to dietary needs, food allergies and whether accommodations need to be made in the conference materials.**
- **Refine the program/agenda.**
- **Confirm speakers:**

Send letter of confirmation with agenda, guidelines for preparing presentations, and presenter's agreement form. Obtain presenter bio sketches.
- **Negotiate and sign facility contracts.**

The more information you have, the easier it is to negotiate. Make sure to include a requirement that the contractor must meet the ADA guidelines for facility accessibility.
- **Contract with a meeting venue.**
 - Verify that sleeping room requirements and room types are defined.
 - Verify that accessible rooms and other accessibility features, such as TTYs, flashing signal lights, roll-in showers, shower benches, signage and step stools, are defined and reserved in the conference room block, which should include both smoking and nonsmoking rooms as well as rooms with different bed types.
 - Ask whether the facility will honor the daily rate for the nearest weekend and the number of attendees who can be accommodated.
 - Meeting room requirements should be spelled out in the contract on a day by-day basis, including accessibility features for guests with disabilities.
 - Identify taxes and service charges within the contract.
 - Confirm and negotiate room rate, meeting room rental and complimentary sleeping rooms.
 - Review cancellation and attrition clauses.
 - Obtain disclosure of any work being performed on the facility that could affect the meeting.
 - Know how many rooms/what food and beverage requirements for meals, receptions and breaks.
 - Audiovisual requirements should be in the contract: Consider your needs relative to taping or transcribing the meeting and whether an on-site audiovisual technician is required.
 - Determine and arrange for on-site office and communications needs, including an Internet provider.
 - Inquire about accessibility features and services that the hotel offers guests with disabilities.

3) Three months out

- **Plan and arrange for local transportation needs:**
who will meet and greet where; shuttles from the airport and train stations; parking at the meeting facility; accessible transportation options, including public mass transit systems (light rail systems or elevated rail, buses, etc.) which are generally now accessible, private taxi services (generally not accessible).
- **Check whether there are any attendees with disabilities who will need extra assistance.**
- **Arrange accessible services, as needed, for presenters and attendees**
including interpreters, audio loops, captioning and Communication Access Realtime Translation (CART).

4) Two months out

- **Determine the way each meeting room should be set up.**
Choose configurations appropriate to the activity and size of the meeting. To be safe, fax your set-up diagram to the venue. Factor in extra space for attendees or participants with disabilities, wheelchairs or other mobility devices, guide dogs, interpreters and other service providers.
- **Order the necessary signage to help the meeting run smoothly**
welcome banners
podiums signs
directional signs
message boards
meal signs
- **Send attendees information about the meeting**
Include participation requirements and information about the hotel/conference facility. Completed registration forms should have a due date one month before the meeting.

5) One month out

- **Send rooming list to hotel.**
When reservations are made directly with the hotel, make sure correspondence goes out to participants, clearly noting that they are responsible for making their own reservations and the date by which that must be done. Include a statement that accessible rooms are limited and those who require accessible rooms should make their reservations early. Send a second reminder if time allows.
- **Find out from attendees and presenters what accommodations they need to participate.**
These include wheelchair access, interpreter, open captioning, large print, Braille, disk (specifically what format), audiocassette and note taker.
- **Confirm attendee billing with the hotel:**
Identify who is on master bill (always includes staff and presenters without grants) and who is self-paying.
- **Finalize food and beverage requirements.**
- **Find out from speakers what audiovisual aids they need.**
- **Finalize room setups and audiovisual needs.**
- **Obtain names, phone numbers and pager numbers of all key hotel staff.**
- **Order attendee materials**
name badges, gift bags and giveaways and other amenities.

6) Two weeks out

- **Prepare bio cards for presenter introductions.**
- **Prepare a Macgyver Meeting Kit to take with you.**
Include a first aid kit, flashlight, measuring tape, screwdriver, laser pointer, spray adhesive, box cutter, duct tape, extension cord, file folder of premade signs, markers, scissors, stapler, and other office supplies.
- **Go over the hotel contract making certain all information is correct.**
Confirm that the audiovisual equipment ordered is available.
- **Supply helpful information in advance of meeting.**
- **Ensure that journal and publication articles have copyright clearance:**
Fax request to the journal's publishing company; obtain and mail copyright clearance checks two weeks prior to meeting.
- **Obtain presenter materials for distribution.**

7) Three days out

- **Provide the hotel with food and beverage guarantees.**
Guarantee about 5 - 10 percent under the anticipated attendance.
- **Confirm information about the meeting events to be posted on directional signs in the hotel lobby and hallways.**
- **Confirm with the facility the needs of guests with disabilities (if any).**
- **Contact the speakers to make sure their audiovisual requirements have not changed.**
Make any adjustments necessary.
- **Review the rooming list and confirm that all participants have pre-registered.**
- **Inspect VIP rooms**
- **Coordinate the "meet and greet" activities and ground transportation for incoming travelers.**

8) On site the day of the meeting

- **Reconfirm all requirements.**
A pre-conference meeting is strongly recommended.
- **Check all meeting room setups and temperature control mechanisms.**
- **Check and test all AV equipment.**
- **Set up a registration desk.**
- **Review billing each day for accuracy.**
- **Review the "sleeping room pick up"—whether all rooms booked have been claimed by attendees.**
Find out if hotel is sold out; it could help with any attrition costs.
- **Inform the hotel or conference facility of all changes in the agenda.**

9) Post-meeting follow-up

- **Review Evaluation forms.**
- **Send thank you letters to presenters with copy of session evaluation results.**
- **Review and ensure payment of bill and reimbursement to presenters, etc.**