

# Convention Checklist



This handy checklist includes important information and details that can “make or break” a successful meeting. Early planning is the first step to success ... this checklist can lead the way!

Tips include:

- Planning meeting objectives, schedule of activities and budget.
- Designing announcements, publicity and mailings for delegates. Setting deadlines.
- Developing an information sheet for each function: meals, tours, spouse programs, hospitality rooms, etc.
- Planning registration procedures and materials.

## Group/Travel Information

### Attendance

Total members expected \_\_\_\_\_

Total guests expected \_\_\_\_\_

Total spouses, family members \_\_\_\_\_

Approximate number of rooms needed:

Single \_\_\_\_\_

Double \_\_\_\_\_

Suites \_\_\_\_\_

Room rates/range \$ \_\_\_\_\_

Policy of hotel regarding confirmation of reservations, deposits, room block cut-off (release) date, complimentary room policy: \_\_\_\_\_

\_\_\_\_\_

### Transportation

Arrangements needed for transportation from airport:

Limousines \_\_\_\_\_

Taxis \_\_\_\_\_

Shuttles \_\_\_\_\_

Buses \_\_\_\_\_

Early/late arrivals \_\_\_\_\_

Private cars \_\_\_\_\_

Buses for tours and off-site functions \_\_\_\_\_

Do you need meet/greet services at airport?

own personnel \_\_\_\_\_

hired personnel \_\_\_\_\_

### Dates

Most of group will arrive \_\_\_\_\_

Most of group will depart \_\_\_\_\_

Uncommitted rooms released \_\_\_\_\_

Convention registration cut-off date \_\_\_\_\_

Hotel registration cut-off date \_\_\_\_\_

Arrangements for early/late arrivals \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Complimentary Accommodations

Number of each room type needed:

Single \_\_\_\_\_

Double \_\_\_\_\_

Suites \_\_\_\_\_

Room rates confirmed \_\_\_\_\_

Bars, snacks, complimentary buffets \_\_\_\_\_

Transportation \_\_\_\_\_

### Registration Form

See checklist (next page) for items to include on form.

## *Items to include on Registration Form*

Use this checklist to prepare registration and promotional materials.

- Name of meeting
- Date of meeting
- Place of meeting
- Delegate name, address, telephone no.
- Name of spouse, if attending
- If sharing room, roommate's name, etc.
- Hotel(s) name, address, phone, fax, room rates
- Cut-off date for hotel registration for group room rates
- Cut-off date for delegate registration for conference
- Late registration fees, if any
- Where to mail hotel registration
- Explain alternate/overflow hotel
- Where to mail conference registration form
- Cost of conference alone
- Advance payment necessary?
- Check payable to?
- Credit cards accepted? Number/Exp. dates.
- Description and cost of special activities or tours
- Number planning to attend each tour
- Description and cost of spouse program
- Number planning to attend
- Description and cost of pre/post convention tours
- Number planning to attend
- Cost of transportation from airport to hotel and by what means
- Check-in/out hours at hotel
- Registration hours and location for on-site conference registration
- Time of arrival and departure
- Refund policies
- Hotel deposit information will be sent with hotel confirmation from hotel or convention bureau (in Tucson bureau does housing upon request only if three or more hotels are contracted)

## Meeting/Event Information

### Finances

Who has fiscal responsibility? \_\_\_\_\_  
Are sponsors needed? \_\_\_\_\_  
Budget \$ \_\_\_\_\_  
Deposit receipts \_\_\_\_\_  
Record keeping \_\_\_\_\_  
Payments \_\_\_\_\_  
Final statement \_\_\_\_\_  
Arrangements handled by:  
    Destination Management Company \_\_\_\_\_  
    Own personnel/volunteers \_\_\_\_\_

### Guest Speakers & Visitors

Invitations to local dignitaries/speakers  
Invitation(s) accepted \_\_\_\_\_  
 Tickets provided  
Lodging provided/for spouse \_\_\_\_\_  
Welcome, host arranged, airport transportation or directions provided \_\_\_\_\_  
 Name tags/ribbons prepared  
 Biography  
Honorarium required \_\_\_\_\_  
Honorarium paid \_\_\_\_\_  
Special equipment needs \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
 Photocopy/print handouts

### Equipment & Facilities

Make list of all equipment needed  
 Make list of all organizational supplies  
 Make list of all items to be rented with prices  
Equipment operators \_\_\_\_\_  
Photographer/Stenographer \_\_\_\_\_  
Signage:  
    Registration \_\_\_\_\_  
    Directional \_\_\_\_\_  
    Welcome \_\_\_\_\_  
    Flags/banners \_\_\_\_\_  
Lights:  
    Spots \_\_\_\_\_  
    Floods \_\_\_\_\_  
    Other \_\_\_\_\_  
Projection equipment:

### Equipment & Facilities (cont.)

Movie \_\_\_\_\_  
Slide \_\_\_\_\_  
Overhead \_\_\_\_\_  
Video \_\_\_\_\_  
Computer \_\_\_\_\_  
Video:  
    VHS \_\_\_\_\_  
    1/2" \_\_\_\_\_  
    Recorder or playback \_\_\_\_\_  
    Monitor \_\_\_\_\_  
    Camera \_\_\_\_\_  
    Tape \_\_\_\_\_  
Audio:  
    Tape recorder \_\_\_\_\_  
    Cassette \_\_\_\_\_  
    Blank tape \_\_\_\_\_  
    Microphone \_\_\_\_\_  
    Sound system \_\_\_\_\_  
Miscellaneous:  
    Chalk board \_\_\_\_\_  
    Flip chart \_\_\_\_\_  
    Chart stand \_\_\_\_\_  
    Screens \_\_\_\_\_  
    Lectern \_\_\_\_\_  
    Extension cords \_\_\_\_\_  
    CD player \_\_\_\_\_

### Meetings

Make list of dates and times of each  
 Make list of room sizes needed for each and setup (theater, banquet, schoolroom, hollow square, etc.)  
 Record names and cost of rooms  
Room needed for office/conference headquarters \_\_\_\_\_  
When rooms can be set up \_\_\_\_\_  
 Make seating plan for each room (skirted tables, etc.)  
Speaker's tables/needs \_\_\_\_\_  
Exhibit areas/needs \_\_\_\_\_  
Microphone type, podium, staging, lectern, water pitcher/glasses \_\_\_\_\_  
Pencils, notepads, handouts \_\_\_\_\_  
 Review equipment checklist above for other needs  
 Mark location of restrooms and smoking areas  
 Signs, flags, banners placed correctly  
Arrangements for breaks/meals (how many & locations)  
\_\_\_\_\_  
\_\_\_\_\_

## Meeting/Event Information

### Food Services

Determine the number of breakfasts, lunches, dinners, receptions, banquets, breaks with their dates and times. You will need the following details for each:

- Theme
- Budget/cost
- Hosted or cash bars
- Menu selection/special dietary needs
- Is meal served in same room or another
- Room format
- Tickets
- Change/receipts
- Ticket takers or hostess at door
- Checklist of names paid/unpaid
- Head table arrangements
- Place cards
- Complimentary meals
- Date for guarantee
- Decorations

*(Always remember to review special equipment needs for each.)*

### Registration Table/On-site Check In

Time \_\_\_\_\_

Location \_\_\_\_\_

Signs \_\_\_\_\_

Personnel:

own \_\_\_\_\_

hired through visitors bureau \_\_\_\_\_

Number of skirted tables/chairs \_\_\_\_\_

Number of typewriters or computers \_\_\_\_\_

Alphabetical quick checklist of registered delegates

Registration packets, Name tags \_\_\_\_\_

Telephones, Walkie Talkies \_\_\_\_\_

Delegate gifts/mementos (likewise gifts for speakers or dignitaries) \_\_\_\_\_

Pencils, pens, stapler, scissors, pads, wastebaskets, cash box, filing boxes if needed \_\_\_\_\_

Tickets for events \_\_\_\_\_

Change & receipts, if selling tickets on-site \_\_\_\_\_

Policy on refunds and accepting checks/credit cards \_\_\_\_\_

### Registration Table/On-site Check In (cont.)

If not in registration packets, visitors guides, maps, or other area collateral supplied by the convention & visitors bureau \_\_\_\_\_

Sewing repair kit & safety pins \_\_\_\_\_

Who sets up registration/who closes daily and where money & materials are stored \_\_\_\_\_

Who makes policy decisions during registration \_\_\_\_\_

### Marketing & Publicity

Develop a plan for both

Develop budgets

Define your target audiences \_\_\_\_\_

Prepare mailing lists

Link web site to [www.visitTucson.org](http://www.visitTucson.org)

Obtain local area media list and media kit (to reach both delegates and press) from Metropolitan Tucson Convention & Visitors Bureau

Design brochures/flyers/write press releases. Use collateral from MITCVB, designed to reach delegates.

Need videos, photos, slides or a logo slick \_\_\_\_\_

Make follow-up calls to city editors (and/or to radio and TV program directors) once press releases are sent out

If you are advertising anywhere:

budget \_\_\_\_\_

ad preparation \_\_\_\_\_

Need photography during conference for post-meeting news releases or for your organization's newsletter to members or for gifts \_\_\_\_\_

Remember to utilize the resources and services supplied through the Director of Convention Services at the Metropolitan Tucson Convention & Visitors Bureau.

Also remember to work closely with your hotel sales manager and the hotel catering/convention services manager. Keep names and phone numbers handy.

HAVE A WONDERFUL MEETING!