

CHAPTER MEETING PLANNING CHECKLIST

SIX MONTHS FROM PLANNED EVENT DATE

- Determine the Date of the Chapter Meeting/Conference
- Determine the location of the Meeting/Conference - Be sure to contact ConferenceDirect for assistance, if needed. ([Contact information located in Volunteer Leader Toolkit](#))
- Complete a [Chapter Event Alert Form](#) (located in the Volunteer Leader Toolkit) to inform the national office of your upcoming meeting. It will be placed on the Calendar of Events, on your region's homepage.
- Form a Planning Committee for program/event planning
- Begin discussions of potential topics and speakers – current hot topics, previous survey feedback for topics; Utilize personal contacts, colleagues, your region board and other sources for determining possible speakers
- Determine compensation/reimbursement of travel, etc. for speakers
- Determine if registration is required of speakers, if so, determine rate
- Discuss possible meeting theme, if applicable
- Create a Sponsorship Prospectus (refer to [Corporate Partner Sponsorship Resources](#) in toolkit)

THREE TO FOUR MONTHS FROM EVENT DATE

- Send CUPA-HR any updates on meeting location and date via [Chapter Event Alert form](#)
- Complete the [E-mail Blast Request Form](#) to send the SAVE THE DATE notice to HR professionals in the geographical area OR to a designated list of contacts by the chapter
- Determine and finalize topics/speakers
- Assign task of reaching out to secure speakers that have not been finalized
- Draft an agenda of the meeting/conference
- Utilize agendas from other chapters and national office to develop agenda for meeting
- Determine registration rate and method of registration
- Update the chapter website if needed

TWO MONTHS FROM EVENT DATE

- Complete [E-mail Blast Request Form](#) to send meeting notice

E-blast should include:

- Meeting Date
- Time
- Location
- Cost
- Contact person for questions
- Meeting theme, Highlight program topics, Highlight speaker
- Registration Link or Link to chapter website
- List of Sponsors

- Determine feedback/survey form needed for use after event (available at meeting OR via email)

TWO TO FOUR WEEKS PRIOR TO EVENT

- Check registration numbers and determine if reminders/additional outreach is necessary
- If conducting personal outreach, assign institutional contacts to planning committee OR other chapter leadership team members
- Plan Food and Beverage with catering – be mindful of dietary restrictions and accommodations
- Establish Budget and Track costs
- Utilize tax exemption, if applicable, to avoid taxes

ONE WEEK PRIOR TO EVENT

- Check registration information
- Create name badges
- Update number of attendees with caterer to finalize food and beverage total
- Send a reminder email to registered of the upcoming event
- Finalize sponsorship relationships
- Confirm signage needed
- Confirm any speaking arrangements
- CUPAHR has corporate logos that can be used in your communication & website, contact: schristensen@cupahr.org
- Confirm sponsors registration, if necessary
- Note: Sponsors appreciate (typically expect) a list of attendees – have available to provide to them (name, title and institution only)
- Assign tasks to chapter leadership of needed work on the day of event – pictures, info desk, speaker go to for troubleshooting, etc.

AFTER THE EVENT

- Send email survey of assessment of the event the week following the event
- Compile/download the survey results
- Report to chapter leadership of results and de-brief of event – makes notes for future planning
- Determine a way of thanking corporate partners again (phone calls/emails)
- Update the chapter website. These updates can include
 - Thanking attendees for a successful meeting
 - Pictures from the meeting
 - Newly elected officers (if changes)
 - Presentation slides/handouts
- Thank planning committee
- Financials – ensure timely payment of invoices, ensure all registration money received (if charge), collect any funds from sponsor, etc.
- Treasurer (or other designated chapter leadership position) captures information for financial report