

**Meeting Checklist**  
**For meetings taking place at FHI 360**

Task	DATE DUE
<b>Logistics</b>	
Determine the objectives of your meeting, the type of room set-up and size you will need to accomplish those objectives given the number of attendees expected.	As soon as preliminary dates are confirmed
Contact the FHI 360 conference department to determine room availability.	As soon as preliminary dates are confirmed
Book meeting space	As soon as the date for the meeting is confirmed
Negotiate government room rate and secure hotel room-block based on estimated attendees needing accommodations.	As soon as the date for the meeting is confirmed
Determine government restrictions in your contract, your budget and assess catering needs. Decide on a menu and inform conference manager.	One month before the meeting
Secure speakers, assess audio-visual needs and inform conference manager.	One month before the meeting
Arrange travel for any speakers or invitees your project is paying for (transportation through West End and lodging through hotel room-block) and provide travelers with travel expense form, instructions and Federal Government travel guidelines.	One month before the meeting
Decide if you are going to need outside vendors (i.e. photographer, videographer, and interpreter) and start procurement process as far in advance as possible.	At least one month before the meeting
Check if there are federal employees who will speak or attend, and will need to pay for their own meals. If so get cash box and get a travel advance for any change you may need. The price of each lunch will be the per-person price listed on the final catering order.	At least one month before the meeting
Find out if any participant may require special accommodations at the meeting (i.e. wheel chair accessibility, sign language capabilities).	At least one month before the meeting
Work with participants to see if there are any dietary restrictions/ request and make sure the caterer is able to meet these needs.	As soon as a menu is received from conferences
Sign catering and AV order as soon as conference manager submits to you. (Request at least one week in advance of meeting to ensure logistics are	As soon as received from conferences

correct).	
At the end of the meeting fill out a <i>Deposit Request</i> form and a <i>Cash Count</i> form (found in the portal <a href="https://forms.fhi360.org/financial/index.html">https://forms.fhi360.org/financial/index.html</a> ) and hand it over to the finance officer assigned to your project along with any cash and receipts you collected at the meeting.	After the meeting.
<b>Meeting</b>	
Finalize objectives of meeting and overall framework for meeting (i.e., educational workshop, teambuilding, strategy or symposium).	At least three months before meeting
Identify speakers, draft invite and then contact them for availability/interest.	At least three months before meeting
Determine any registration fees or costs associated with the meeting.	
Draft list of possible invitees/attendees.	
Draft invitation letters.	
Mail or email invitation letters.	At least one month before meeting
Draft and maintain attendee list.	Ongoing
Decide on seating arrangements for speakers and attendees.	Once you have a final attendee list
Finalize attendee list.	Three days in advance
Determine materials to support meeting objectives.	At least one month before meeting
Draft materials for attendees.	
Finalize materials.	At least one week before meeting
Order supplies needed (flip charts, pens, name badges, name badge holders, name tents).	At least one week before meeting
Draft program.	At least one week before meeting
Make signs to place near elevators and other strategic places to direct attendees to your meeting.	Three days before meeting
Go to the meeting room to make sure that all the equipment is properly set up and that it is working (lap tops, microphones, and projector).	As soon as the conference department is done setting up in the room (a day before the meeting)
Prepare name badges and participant packages; conduct final walk-thru of presentations for timing and flow.	A day before the meeting