



# CHAPTER 8 DO AND DON'T GUIDELINES AND CHECK LISTS



**DO:**

1. Put together a “goodie bag” for the participants with such things as pencils, tablets, candy, crackers, etc. Include a program. Programs are important. This can be a simple flyer or a professional booklet.
2. Start a campaign to interest participants. Publicize the schedule, price, registration form, vendor and advertising fees. Encourage local clubs to support the program. Have the offer scholarships, free rooms, contribute to the “goodie bags”, take vendor space, etc. Put up flyers in tack shops. Send articles to all club newsletters and appropriate bred publications. Use as much free advertising as possible. Limit paid advertising.
3. As the date nears, line up additional volunteers to man the registration desk, fill the “goodie bags”, change room marquees, decorate tables, introduce guests, and do other last minute, necessary jobs.
4. Make sure your facility has plenty of rest rooms; if not order portable toilets.
5. Allow stretch breaks between sessions.
6. Try to find ways to involve youth, perhaps grooming horses for the experts, etc.
7. Schedule social activities.
8. Try to enlist some volunteers for babysitting services; many senior citizens are glad to help.
9. Hire a photographer and videographer.
10. Make sure you have and are covered by insurance.

**DON'T**

1. Don't leave details until the last minute.
2. Don't try to squeeze too many activities into one session; you will lose your attendee's attention.
3. Don't allow your speaker to go over their time limit if more than one event is scheduled in a day or time period.
4. Don't choose an event larger than your club can handle
5. Don't take anything for granted.
6. Don't pretend to have all the answers. Be willing to ask for and take help or advice.
7. Don't forget insurance requirements.

**NOTE:** The following check lists are very detailed. DO NOT be intimidated by their size. Some will pertain to your event and some will not. Pick and choose what will help you. By utilizing these forms it should help alleviate your committee's fears about what may have been overlooked.

### CHECK LIST/PRE-EVENT BRIEFING

<p><b>1. Review all assignments, arrangements, changes with</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Auditorium manager, key personnel</li> <li><input type="checkbox"/> Equine facility personnel</li> <li><input type="checkbox"/> Event bureau representative, key personnel</li> <li><input type="checkbox"/> Event committee, official, key personnel</li> <li><input type="checkbox"/> Exhibit hall manager, key personnel</li> <li><input type="checkbox"/> Horse event manager, key personnel</li> <li><input type="checkbox"/> Hotel executive, key personnel</li> <li><input type="checkbox"/> Outside business firms, key personnel</li> <li><input type="checkbox"/> Volunteers</li> </ul> <p><b>2. Functions</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Exhibits</li> <li><input type="checkbox"/> Food functions</li> <li><input type="checkbox"/> Horse events (Show, clinics, etc.)</li> <li><input type="checkbox"/> Meetings</li> <li><input type="checkbox"/> Sessions</li> <li><input type="checkbox"/> Sightseeing trips</li> <li><input type="checkbox"/> Social events</li> <li><input type="checkbox"/> Special events</li> <li><input type="checkbox"/> Special tours</li> </ul> <p><b>3. Facilities, equipment, services</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Accounting procedure</li> <li><input type="checkbox"/> Bedding</li> <li><input type="checkbox"/> Beverages</li> <li><input type="checkbox"/> Cashiering</li> <li><input type="checkbox"/> Credit (Organization, staff, registrants)</li> <li><input type="checkbox"/> Engineering, special utilities</li> <li><input type="checkbox"/> Entertainment</li> <li><input type="checkbox"/> Exhibits</li> <li><input type="checkbox"/> Feed</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> First aid</li> <li><input type="checkbox"/> Food (Menus, other)</li> <li><input type="checkbox"/> Housing, reservations (Regular, staff, special guests)</li> <li><input type="checkbox"/> Housekeeping</li> <li><input type="checkbox"/> Meetings</li> <li><input type="checkbox"/> Parking</li> <li><input type="checkbox"/> Photographs</li> <li><input type="checkbox"/> Printing, duplicating</li> <li><input type="checkbox"/> Projection equipment (Include TV &amp; VCR)</li> <li><input type="checkbox"/> Public address system</li> <li><input type="checkbox"/> Publicity, press relations</li> <li><input type="checkbox"/> Receiving, shipping</li> <li><input type="checkbox"/> Registration</li> <li><input type="checkbox"/> Reporting</li> <li><input type="checkbox"/> Security (Guards, ushers, safety deposit space)</li> <li><input type="checkbox"/> Stalls</li> <li><input type="checkbox"/> Telephone, telegraph, messages</li> <li><input type="checkbox"/> Transportation</li> </ul> <p><b>4. Meeting room setup - detailed instructions on function sheets</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Given</li> <li><input type="checkbox"/> Updated</li> <li><input type="checkbox"/> Checked</li> </ul> <p><b>5. Events materials</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Received</li> <li><input type="checkbox"/> Organized</li> <li><input type="checkbox"/> Distributed</li> </ul>
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## CHECK LIST/SITE SELECTION

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| <p><b>1. Organization</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Name</li> <li><input type="checkbox"/> Address</li> <li><input type="checkbox"/> Type</li> </ul> <p><b>2. Event official</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Name</li> <li><input type="checkbox"/> Title</li> <li><input type="checkbox"/> Address</li> <li><input type="checkbox"/> Local contacts, if any</li> </ul> <p><b>3. Event</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Characteristics</li> <li><input type="checkbox"/> Duration of meetings<br/>(Pre-event, event period, post-event)</li> <li><input type="checkbox"/> Exhibits</li> <li><input type="checkbox"/> Expected attendance</li> <li><input type="checkbox"/> Food functions</li> <li><input type="checkbox"/> Meetings</li> <li><input type="checkbox"/> Social functions</li> <li><input type="checkbox"/> Other</li> </ul> <p><b>4. Location</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Accessibility<br/>(Air, bus, car, train)</li> <li><input type="checkbox"/> Attractions</li> <li><input type="checkbox"/> Climate</li> <li><input type="checkbox"/> Holidays</li> <li><input type="checkbox"/> Metropolitan</li> <li><input type="checkbox"/> Resort</li> <li><input type="checkbox"/> Special events</li> </ul> <p><b>5. Equine facilities</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Climate suitability</li> <li><input type="checkbox"/> Food facilities</li> <li><input type="checkbox"/> Footing</li> <li><input type="checkbox"/> Parking</li> <li><input type="checkbox"/> Rest room facilities</li> <li><input type="checkbox"/> Ring capacity</li> <li><input type="checkbox"/> Seating capacity</li> <li><input type="checkbox"/> Security</li> <li><input type="checkbox"/> Sound systems</li> <li><input type="checkbox"/> Stall availability</li> <li><input type="checkbox"/> Vehicle accessibility</li> </ul> <p><b>6. Other events booked immediately prior to, overlapping, immediately following - effect on</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Equipment</li> <li><input type="checkbox"/> Exhibit space</li> <li><input type="checkbox"/> Facilities</li> <li><input type="checkbox"/> Meeting rooms</li> <li><input type="checkbox"/> Services</li> <li><input type="checkbox"/> Sleeping rooms</li> </ul> <p><b>7. Convention bureau</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Name of bureau</li> <li><input type="checkbox"/> Name of representative</li> <li><input type="checkbox"/> Address</li> <li><input type="checkbox"/> Facilities, equipment, services<br/>(Complimentary, charges)</li> </ul> <p><b>8. Hotel</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Number</li> <li><input type="checkbox"/> Names</li> <li><input type="checkbox"/> Accessibility</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Availability</li> <li><input type="checkbox"/> Appearance<br/>(Inside, outside)</li> <li><input type="checkbox"/> Hotel executives<br/>(General manager, sales manager, event service manager, reservations manager, banquet manager)</li> <li><input type="checkbox"/> Sleeping rooms<br/>(Number, type, upkeep, rates)</li> <li><input type="checkbox"/> Meeting rooms<br/>(Number, type, upkeep, lighting, ventilation control - cooling/heating, capacity - by setup, obstructions, food service available, suitability for exhibits, facilities - equipment/services/charges/if any)</li> </ul> <p><b>9. Facilities, equipment, services other than those available through hotel or convention bureau</b></p> <p><b>10. Working relationship</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Convention bureau</li> <li><input type="checkbox"/> Hotels</li> <li><input type="checkbox"/> Local business firms</li> <li><input type="checkbox"/> Unions</li> </ul> <p><b>11. Exhibit space</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Access<br/>(Limiting dimensions, limiting weight, other limitations)</li> <li><input type="checkbox"/> Address</li> <li><input type="checkbox"/> Auditorium manager</li> <li><input type="checkbox"/> Ceiling height<br/>(Maximum, limitations)</li> <li><input type="checkbox"/> Decorating services available</li> <li><input type="checkbox"/> Drayage policy</li> <li><input type="checkbox"/> Food and beverage capability</li> <li><input type="checkbox"/> Lighting</li> <li><input type="checkbox"/> Maximum floor load<br/>(Live, static)</li> <li><input type="checkbox"/> Move-in or move-out limitations</li> <li><input type="checkbox"/> Rental charge</li> <li><input type="checkbox"/> Square footage</li> <li><input type="checkbox"/> Storage policy</li> <li><input type="checkbox"/> Utilities</li> <li><input type="checkbox"/> Ventilation control<br/>(Cooling, heating)</li> <li><input type="checkbox"/> Width and height of door openings</li> </ul> <p><b>12. Local tax rate</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Beverage</li> <li><input type="checkbox"/> Entertainment</li> <li><input type="checkbox"/> Food</li> <li><input type="checkbox"/> Hotel tax</li> <li><input type="checkbox"/> Other</li> </ul> <p><b>13. Local alcoholic beverage laws, policies</b></p> <p><b>14. Rules, regulations, licenses, policies, practices applicable to event</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Hotel</li> <li><input type="checkbox"/> Local</li> <li><input type="checkbox"/> Other</li> </ul> <p><b>15. Special areas to follow up</b></p> <p><b>16. Other important comments</b></p> <p><b>17. Put everything in writing</b></p> |
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## CHECK LIST/EVENT SERVICES MANAGER

<p><b>1. Title with authority</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Name</li> <li><input type="checkbox"/> Telephone extension</li> <li><input type="checkbox"/> Pager or beeper</li> <li><input type="checkbox"/> Duty schedule</li> <li><input type="checkbox"/> Status department head/or staffer</li> <li><input type="checkbox"/> Secretary's name (Back-up person)</li> <li><input type="checkbox"/> Reports to</li> </ul> <p><b>2. Areas of responsibility/liaison</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Accounting</li> <li><input type="checkbox"/> Audiovisuals</li> <li><input type="checkbox"/> Bulletin boards</li> <li><input type="checkbox"/> Catering</li> <li><input type="checkbox"/> Entertainment</li> <li><input type="checkbox"/> Gratuities</li> <li><input type="checkbox"/> Local transportation</li> <li><input type="checkbox"/> Set-up crews</li> <li><input type="checkbox"/> Telephones</li> <li><input type="checkbox"/> VIP reservations</li> </ul>	<p><b>3. Communications</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Copies of all correspondence to other departments</li> <li><input type="checkbox"/> First meeting (When, where)</li> <li><input type="checkbox"/> Intra-hotel distribution</li> <li><input type="checkbox"/> Preliminary program</li> <li><input type="checkbox"/> Standardized forms</li> <li><input type="checkbox"/> Preliminary staging guide</li> <li><input type="checkbox"/> Final staging guide</li> </ul> <p><b>4. On site</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Set up pre-opening meeting</li> <li><input type="checkbox"/> Arrange daily meetings</li> <li><input type="checkbox"/> Introduce to staff</li> <li><input type="checkbox"/> Introduce to VIPs</li> <li><input type="checkbox"/> Updated schedule</li> <li><input type="checkbox"/> Daily critique</li> <li><input type="checkbox"/> Follow-up critique</li> </ul>
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## CHECK LIST/HOUSING AND RESERVATIONS

<p><b>1. Expected attendance</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> New location</li> <li><input type="checkbox"/> Repeat location</li> </ul> <p><b>2. Previous pattern of arrivals, departures</b></p> <p><b>3. Sleeping accommodations</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Number needed, committed - rates</li> <li><input type="checkbox"/> Singles</li> <li><input type="checkbox"/> Double-bedded</li> <li><input type="checkbox"/> Twin-bedded</li> <li><input type="checkbox"/> Suites (Parlor - 1 bedroom, parlor - 2 bedrooms)</li> <li><input type="checkbox"/> Other</li> </ul> <p><b>4. Period for which event rates apply</b></p> <p><b>5. Complimentary accommodations</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Number</li> <li><input type="checkbox"/> Type</li> <li><input type="checkbox"/> Assignment</li> </ul> <p><b>6. Hospitality suites for official use of organization</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Number</li> <li><input type="checkbox"/> Type</li> <li><input type="checkbox"/> Rates</li> </ul> <p><b>7. Reservation forms</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Confirmation and assignment of accommodations (Hotel, type, rate)</li> <li><input type="checkbox"/> Mailed by</li> <li><input type="checkbox"/> Mailing date schedule</li> <li><input type="checkbox"/> Returned to (Hotel reservation request)</li> <li><input type="checkbox"/> Supplied by</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Type</li> <li><input type="checkbox"/> Who gets copies</li> <li><input type="checkbox"/> Who handles</li> </ul> <p><b>8. Procedure for handling special and speaker reservations</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Complimentary</li> <li><input type="checkbox"/> Paid by individual</li> <li><input type="checkbox"/> Paid by organization</li> <li><input type="checkbox"/> Reserved by individual</li> <li><input type="checkbox"/> Reserved by organization</li> </ul> <p><b>9. Release date for unassigned accommodations</b></p> <p><b>10. Procedure for keeping the event official, hotel executive, and convention bureau representative informed as to number</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Reservations</li> <li><input type="checkbox"/> Cancellations</li> <li><input type="checkbox"/> No-shows</li> </ul> <p><b>11. Tax rate</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Federal</li> <li><input type="checkbox"/> State</li> <li><input type="checkbox"/> Local</li> </ul> <p><b>12. Alcoholic beverages</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Local laws</li> <li><input type="checkbox"/> Policies</li> <li><input type="checkbox"/> Practices</li> </ul> <p><b>13. Rules, regulations, licenses, policies, practices</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Hotel</li> <li><input type="checkbox"/> Local</li> <li><input type="checkbox"/> Union</li> </ul>
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## CHECK LIST/CONVENTION BUREAU, HALL, OUTSIDE SERVICES

### 1. Check the Bureau for:

- Advance registration
- Adding machines
- Arrange special facilities
- Attendance stimulation
- Badges
- Banners
- Bold face typewriters
- Bonded registration clerks, typists and cashiers
- Brochures and informative materials
- Bulletin typewriters
- Calculators
- Cash boxes
- Children's programs
- Color slides
- Copy machines
- Discount bus passes
- Entertainment guide
- Extra registration help
- Familiarization tour for meeting planners
- Fashion show arrangements
- Films  
(16mm)
- Flyers
- Housing bureau  
(Sometimes available only for multi-hotel events)
- Information hosts and hostesses
- Information kits
- Interpreters
- Invitations assistance
- Liaison for all contacts and suppliers
- Liaison with public officials
- Luncheons
- Mailings
- Maps
- News media contacts
- News releases
- Office furniture
- Office space for organization staff
- Official greeting
- Parking permits, cards, stickers
- Personnel to assist with ticket sales
- Photographs
- Plastic information bags
- Post-event tour assistance
- Posters
- Pre-planning assistance
- Professional services
- Program covers
- Publicity staff direction  
(On consulting basis)
- Registration assistance  
(Standard and formal basis)

- Registration cards
- Religious leaders  
(Secure services for opening and closing session)
- Restaurant guide
- Ribbons
- Secretarial services
- Shopping programs
- Sightseeing trips
- Site selection assistance
- Solicitations assistance
- Sports events
- Spouse programs
- Transportation coordinator
- VIP gifts
- VIP transport
- Walking tour pamphlets
- Welcome letter
- Welcome packets

### 2. Check the hall for:

- Check room
- Concession stands
- Crate handling
- Exhibit booths
- Exhibit hall floor plan
- Food and beverage service
- Forklift
- Housekeeping
- Labor pool
- Lecterns
- Microphones
- Office space
- Organ
- Parking space
- Piano
- Pipe and drape
- Portable seats
- Portable stage
- Projectors
  - 16 mm
  - Slide
- Receiving shipments
- Registration space
- Rental fees
- Rest rooms
- Security
- Screen(s) for projector(s)
- Sound systems
  - Permanent
  - Portable
- Spotlights
- Storage
- Table and chairs

## CHECK LIST/CONVENTION BUREAU, HALL, OUTSIDE SERVICES (Cont.)

<ul style="list-style-type: none"> <li><input type="checkbox"/> Telephone service</li> <li><input type="checkbox"/> Truck access</li> <li><input type="checkbox"/> Ushers</li> <li><input type="checkbox"/> Utilities</li> <li><input type="checkbox"/> Wheelchair access</li> <li><b>3. Check with outside suppliers for:</b></li> <li><input type="checkbox"/> Advertising             <ul style="list-style-type: none"> <li><input type="checkbox"/> Direct mail</li> <li><input type="checkbox"/> Display designs and producers</li> <li><input type="checkbox"/> Motion picture</li> <li><input type="checkbox"/> Outdoor</li> <li><input type="checkbox"/> Periodicals</li> <li><input type="checkbox"/> Producers</li> </ul> </li> <li><input type="checkbox"/> Audiovisual</li> <li><input type="checkbox"/> Car rentals</li> <li><input type="checkbox"/> Carpentry</li> <li><input type="checkbox"/> Catering</li> <li><input type="checkbox"/> Decorations</li> <li><input type="checkbox"/> Entertainment</li> <li><input type="checkbox"/> Flowers</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Freight forwarders</li> <li><input type="checkbox"/> Freight handling</li> <li><input type="checkbox"/> Modeling agencies</li> <li><input type="checkbox"/> Photographs</li> <li><input type="checkbox"/> Printing</li> <li><input type="checkbox"/> Publicity             <ul style="list-style-type: none"> <li><input type="checkbox"/> Newspapers</li> <li><input type="checkbox"/> Magazines</li> <li><input type="checkbox"/> Radio</li> <li><input type="checkbox"/> TV</li> </ul> </li> <li><input type="checkbox"/> Speakers</li> <li><input type="checkbox"/> Tours</li> <li><input type="checkbox"/> Transportation             <ul style="list-style-type: none"> <li><input type="checkbox"/> Airlines</li> <li><input type="checkbox"/> Charters</li> <li><input type="checkbox"/> Auto leasing</li> <li><input type="checkbox"/> Bus lines</li> <li><input type="checkbox"/> Limousine service</li> <li><input type="checkbox"/> Taxis</li> </ul> </li> </ul>
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## CHECK LIST/FOOD, BEVERAGE FUNCTIONS

<ul style="list-style-type: none"> <li><b>1. Type of function</b></li> <li><input type="checkbox"/> Expected attendance</li> <li><input type="checkbox"/> Nature (Business, social, dance, hospitality)</li> <li><input type="checkbox"/> Timing (Morning, noon, afternoon, dinner, evening, continuous)</li> <li><b>2. Accommodations</b></li> <li><input type="checkbox"/> Type of room</li> <li><input type="checkbox"/> Size of room (Dimensions, columns, obstructions)</li> <li><input type="checkbox"/> Acoustics</li> <li><input type="checkbox"/> Charges</li> <li><input type="checkbox"/> Decor</li> <li><input type="checkbox"/> Housekeeping</li> <li><input type="checkbox"/> Lighting (Adequacy, glare, reflections)</li> <li><input type="checkbox"/> Maintenance</li> <li><input type="checkbox"/> Scaled floor plan</li> <li><input type="checkbox"/> Seating capacity</li> <li><input type="checkbox"/> Ventilation-control (Cooling, heating)</li> <li><b>3. Schedule of costs</b></li> <li><input type="checkbox"/> Room</li> <li><input type="checkbox"/> Food</li> <li><input type="checkbox"/> Beverages</li> <li><input type="checkbox"/> Services</li> <li><input type="checkbox"/> Gratuities (Contract, optional, basic charge, overtime)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Entertainment (Fees, union requirements, maintenance, taxes, travel charges)</li> <li><input type="checkbox"/> Facilities, equipment (Regular, special)</li> <li><input type="checkbox"/> Souvenirs (Awards)</li> <li><input type="checkbox"/> Decorations</li> <li><b>4. Rules, regulations, licenses, policies, practices</b></li> <li><input type="checkbox"/> Federal/State</li> <li><input type="checkbox"/> Hotel</li> <li><input type="checkbox"/> Local</li> <li><input type="checkbox"/> Organization</li> <li><input type="checkbox"/> Union</li> <li><b>5. Alcoholic beverage controls</b></li> <li><input type="checkbox"/> Corkage</li> <li><input type="checkbox"/> Licenses</li> <li><input type="checkbox"/> Local laws/restrictions</li> <li><input type="checkbox"/> Lounge hours and capacities</li> <li><input type="checkbox"/> Policies and practices</li> <li><b>6. Taxes</b></li> <li><input type="checkbox"/> Local</li> <li><input type="checkbox"/> Federal</li> <li><input type="checkbox"/> State</li> <li><input type="checkbox"/> Other</li> <li><b>7. Restrictive policies, practices</b></li> <li><input type="checkbox"/> Community</li> <li><input type="checkbox"/> Hotel</li> <li><input type="checkbox"/> Organization</li> </ul>
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## CHECK LIST/FOOD, BEVERAGE FUNCTIONS (Cont.)

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| <p><b>8. Banquet time schedule</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Room setup</li> <li><input type="checkbox"/> Tickets on sale at door</li> <li><input type="checkbox"/> Cocktails</li> <li><input type="checkbox"/> Doors open</li> <li><input type="checkbox"/> Head table guests<br/>(Assemble, enter)</li> <li><input type="checkbox"/> Special opening<br/>(National anthem, invocation, other)</li> <li><input type="checkbox"/> Food service</li> <li><input type="checkbox"/> Tables cleared</li> <li><input type="checkbox"/> Music</li> <li><input type="checkbox"/> Entertainment</li> <li><input type="checkbox"/> Speakers</li> <li><input type="checkbox"/> Dancing</li> </ul> <p><b>9. Room setup</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Scaled diagram</li> <li><input type="checkbox"/> Expected attendance<br/>(Extra settings)</li> <li><input type="checkbox"/> Type of function</li> <li><input type="checkbox"/> Furniture<br/>(Type, quantity, arrangement)</li> <li><input type="checkbox"/> Stage, platform, dance floor<br/>(Location, width/height and depth, shape, dimensions, surface, proscenium height, runways, ramps, risers)</li> <li><input type="checkbox"/> Access aisles</li> <li><input type="checkbox"/> Lighting<br/>(Regular, special)</li> <li><input type="checkbox"/> Decorations</li> <li><input type="checkbox"/> Public address system</li> <li><input type="checkbox"/> Acoustics</li> <li><input type="checkbox"/> Ventilation controls</li> <li><input type="checkbox"/> Facilities, equipment</li> </ul> <p><b>10. Buffet setup table service</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expected attendance</li> <li><input type="checkbox"/> Tables<br/>(Size, shape, seating capacity, arrangements)</li> <li><input type="checkbox"/> Chairs - type</li> <li><input type="checkbox"/> Access aisles<br/>(Buffet setup serpentine, etc.)</li> </ul> <p><b>11. Hospitality function setup</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Expected attendance</li> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Furniture<br/>(Occasional, conversational groups)</li> <li><input type="checkbox"/> Coffee, snack tables</li> <li><input type="checkbox"/> Bar</li> <li><input type="checkbox"/> Decorations</li> </ul> <p><b>12. Head table guests assembly</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Assembly room<br/>(Furniture, arrangement)</li> <li><input type="checkbox"/> Bar service - bartender, waiter</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Time of assembly</li> <li><input type="checkbox"/> Host, hostess</li> <li><input type="checkbox"/> Line up arrangement for seating</li> <li><input type="checkbox"/> Boutonnieres</li> <li><input type="checkbox"/> Usher, guide</li> </ul> <p><b>13. Head table</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Size</li> <li><input type="checkbox"/> Floor level</li> <li><input type="checkbox"/> Raised<br/>(Single level, multiple levels)</li> <li><input type="checkbox"/> Floor covering</li> <li><input type="checkbox"/> Seating<br/>(Chairs - type, arrangement, number, place cards)</li> <li><input type="checkbox"/> Decorations</li> <li><input type="checkbox"/> Special beverages</li> <li><input type="checkbox"/> Cigars, cigarettes</li> <li><input type="checkbox"/> Accounting record of number served</li> <li><input type="checkbox"/> Special service</li> </ul> <p><b>14. Lectern</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Light<br/>(Switch location, operating, beam adjusted, glare checked, speaker, head table, audience)</li> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Placement<br/>(Prior placement, place on signal)</li> <li><input type="checkbox"/> Type - adequate</li> <li><input type="checkbox"/> Public address system</li> <li><input type="checkbox"/> Teleprompter</li> <li><input type="checkbox"/> Gavel</li> <li><input type="checkbox"/> Signal systems<br/>(Speaker timing, lights-on/off, projection service)</li> <li><input type="checkbox"/> Pointer<br/>(Plain, lighted indicator)</li> <li><input type="checkbox"/> Water, fresh-glass<br/>(Easily available, inconspicuous, safe from spilling)</li> </ul> <p><b>15. Reserved seat function location</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Indoors</li> <li><input type="checkbox"/> Outdoors</li> <li><input type="checkbox"/> Outdoors with indoors</li> <li><input type="checkbox"/> Alternate</li> <li><input type="checkbox"/> Scaled floor plan</li> </ul> <p><b>16. Reserved table arrangement</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Layout diagrammed<br/>(Table placement, access aisles)</li> <li><input type="checkbox"/> Tables marked<br/>(Table number, seating capacity - standard/ exceptions/number of seats/table shape)</li> <li><input type="checkbox"/> Checked with site</li> <li><input type="checkbox"/> Diagram copies available<br/>(Reservations desk, hotel, ushers, posted notices)</li> <li><input type="checkbox"/> Pre-function check<br/>(Arrangement, table numbers, table seating capacity)</li> </ul> |
|---|---|



## CHECK LIST/FOOD, BEVERAGE FUNCTIONS (Cont.)

- 17. Seat reservations**
- Assignment  
(Advance, current)
  - Notification  
(Marked on tickets, seating lists, by names, by tables)
- 18. Transfer considerations in table numbering at alternate location**
- Relative position  
(Head table, stage, dance floor, other)
  - Relative arrangements  
(Special guests, multiple party groups, other)
  - Table layout diagram  
(Prepared in advance, checked with hotel, copies as required - hotel/posted/ushers)
  - Table numbers  
(Not in sequence - retaining: original seat assignments/relative position/relative arrangement. In sequence: requiring reassignment of seats to retain relative position/relative arrangement)
- 19. Notice of location change**
- Bulletin board notice  
(Change notice, directional)
  - Signs
  - Ushers as required
  - Verbal announcements
  - Written notice
- 20. Menus - charges**
- Breakfast
  - Dinner
  - Luncheon
  - Cocktail reception
  - Tea
  - Coffee break
  - Hospitality hour
- 21. Charges - coverage**
- Food
  - Beverages
  - Gratuities
  - Taxes
- 22. Types of service, basis of charges, gratuities**
- Self-service
  - Captains
  - Waiters
  - Bartenders
  - Attendants
- 23. Best estimate, guarantee of covers needed**
- Deadline day, time
  - Percentage leeway
- 24. Beverages - functions, room service**
- Type
  - Order timing  
(Advance, current service)
- Charges - basis  
(By bottle, by drink, by person, beverages - drink/bottle/package/corkage, glasses, ice, mixes, snacks, gratuities, taxes)
  - Return of unused beverages  
(Mixes, unopened bottles, opened bottles)
  - Check-in, out procedures
- 25. Materials for distribution**
- Agendas
  - Favors, souvenirs
  - Menus
  - Place cards
  - Programs
  - Table identification cards
  - Table notices  
(Gratuity handling, complimented items)
- 26. Type of admission - procedure facilities for sale or issuance**
- Badges
  - Cards
  - Tickets
  - Other
- 27. Collection of admissions**
- Personnel  
(Available, instructed)
  - Timing  
(At entrance, at table, at buffet)
  - At head table
- 28. Instructions for special admission problems**
- Door checks for readmission
  - Required admission missing  
(At head table, in audience)
  - Wrong reserved seat occupied
- 29. Instructions for return of collected admissions to organization**
- Hotel
  - Organization personnel
- 30. Facilities, equipment, services availability, sources**
- Convention bureau
  - Hotel
  - Organization
  - Outside firms
- 31. Lighting**
- Regular
  - Table lamps
  - Spots
  - Drop lights
  - Other
- 32. Electricity**
- AC
  - DC
  - Special

## CHECK LIST/FOOD, BEVERAGE FUNCTIONS (Cont.)

- |  |   |
|--|---|
| <p><b>33. Teleprompter</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Ordered</li><li><input type="checkbox"/> In place</li><li><input type="checkbox"/> Working</li></ul> <p><b>34. Public address system</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Microphones in place</li><li><input type="checkbox"/> Tested, operating</li><li><input type="checkbox"/> Volume adjusted</li><li><input type="checkbox"/> Attendant<br/>(On hand, immediately available)</li></ul> <p><b>35. Microphones</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Type</li><li><input type="checkbox"/> Portable<br/>(Hand, yoke, lapel)</li><li><input type="checkbox"/> Fixed<br/>(Lectern, table, stand)</li><li><input type="checkbox"/> Number</li><li><input type="checkbox"/> Location</li><li><input type="checkbox"/> Adjustments<br/>(On/off, height, distance, direction)</li><li><input type="checkbox"/> Mixer requirements</li><li><input type="checkbox"/> Tested, operating</li></ul> <p><b>36. Decorations, flowers, props</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Need determined</li><li><input type="checkbox"/> Ordered</li><li><input type="checkbox"/> Installation time set</li><li><input type="checkbox"/> Arrangement</li><li><input type="checkbox"/> Placement</li><li><input type="checkbox"/> Charges</li><li><input type="checkbox"/> Installation checked</li><li><input type="checkbox"/> Removal instructions</li><li><input type="checkbox"/> Post-function use</li></ul> <p><b>37. Special services</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Checkrooms</li><li><input type="checkbox"/> Elevators</li><li><input type="checkbox"/> Garage facilities</li><li><input type="checkbox"/> Parking</li><li><input type="checkbox"/> Telephone</li><li><input type="checkbox"/> Traffic control</li><li><input type="checkbox"/> Transportation</li></ul> <p><b>38. Telephone, message service</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Incoming</li><li><input type="checkbox"/> Outgoing</li><li><input type="checkbox"/> Restrictions</li><li><input type="checkbox"/> Changes</li></ul> <p><b>39. Special personnel</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Available</li><li><input type="checkbox"/> Instructed</li></ul> <p><b>40. Escorts for special guests</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Assigned</li><li><input type="checkbox"/> Back-up arranged</li></ul> | <p><b>41. Ticket service</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Cashiers</li><li><input type="checkbox"/> Clerks</li><li><input type="checkbox"/> Ticket collectors</li></ul> <p><b>42. Attendants</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Doorpersons</li><li><input type="checkbox"/> Guards</li><li><input type="checkbox"/> Ushers</li></ul> <p><b>43. Reporters, recorders</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Equipment<br/>(In place, place on signal)</li><li><input type="checkbox"/> Operator<br/>(Available, instructed, reference material on hand)</li></ul> <p><b>44. Photographer</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Equipment available</li><li><input type="checkbox"/> Event, person(s) named</li></ul> <p><b>45. Projection, demonstration equipment: props</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Location</li><li><input type="checkbox"/> Placement timing<br/>(In place, place on signal)</li><li><input type="checkbox"/> Special operator<br/>(Available, instructed)</li><li><input type="checkbox"/> Maximum visibility<br/>(Screen, display boards/charts, demonstration tables)</li><li><input type="checkbox"/> Reference material<br/>(Available, identified, in proper order)</li><li><input type="checkbox"/> Charges</li></ul> <p><b>46. Entertainment</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Type<br/>(Speakers, music, show, moving picture, other)</li><li><input type="checkbox"/> Rehearsals<br/>(Time, location)</li><li><input type="checkbox"/> Dressing rooms<br/>(Adequate lights, mirrors, hangers, rest room facilities)</li><li><input type="checkbox"/> Special requirements<br/>(Stage, lighting, props)</li></ul> <p><b>47. Signs</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Publicity</li><li><input type="checkbox"/> Identification</li><li><input type="checkbox"/> Direction</li><li><input type="checkbox"/> Other</li></ul> <p><b>48. Publicity</b></p> <ul style="list-style-type: none"><li><input type="checkbox"/> Bulletin board notices</li><li><input type="checkbox"/> Posters</li><li><input type="checkbox"/> Signs</li><li><input type="checkbox"/> Written notices - distributed<br/>(Individually - mail boxes/room doors/other; on tables for pickup, other)</li></ul> |
|--|---|

## CHECK LIST/SPEAKERS

<p><b>1. Objectives</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Meet with planning committee</li> </ul> <p><b>2. Sources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Colleagues</li> <li><input type="checkbox"/> Government agencies/colleges</li> <li><input type="checkbox"/> Other organizations in your field</li> <li><input type="checkbox"/> Speakers associations</li> <li><input type="checkbox"/> Trade publications</li> </ul> <p><b>3. Screening possible speakers</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Cassette of speech</li> <li><input type="checkbox"/> Check references</li> <li><input type="checkbox"/> Notes during telephone conversation</li> <li><input type="checkbox"/> Obtain copy of speech</li> <li><input type="checkbox"/> Sit in on actual presentation</li> </ul> <p><b>4. Tell chosen speakers</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Date, time of presentation</li> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Size, age and sex of your group</li> <li><input type="checkbox"/> Redefine objectives of meeting</li> <li><input type="checkbox"/> Special interests of attendees</li> <li><input type="checkbox"/> Specific topic to be covered</li> <li><input type="checkbox"/> Layout of room</li> <li><input type="checkbox"/> Special clothing requirements</li> <li><input type="checkbox"/> Fees and expenses to be paid</li> </ul>	<p><b>5. Advance information</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Hotel arrangements</li> <li><input type="checkbox"/> Travel arrangements</li> <li><input type="checkbox"/> Add name to promotion list</li> <li><input type="checkbox"/> Audiovisual requirements</li> <li><input type="checkbox"/> Permission to tape presentation</li> <li><input type="checkbox"/> Picture and biographical material</li> <li><input type="checkbox"/> Attending alone or with a guest</li> </ul> <p><b>6. Rehearsal</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Room arranged</li> <li><input type="checkbox"/> Speaker notified of time and place</li> <li><input type="checkbox"/> Audiovisual equipment in place</li> </ul> <p><b>7. Pre-meeting</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Escort assigned for airport and to meeting room</li> <li><input type="checkbox"/> Badge provided for speaker and guest</li> <li><input type="checkbox"/> Tickets to functions provided</li> <li><input type="checkbox"/> Arrangements to entertain</li> <li><input type="checkbox"/> Plans made for speaker's guest</li> <li><input type="checkbox"/> Gifts in room</li> </ul> <p><b>8. Introduction</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Cleared with speaker</li> </ul>
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## CHECK LIST/REGISTRATION, INFORMATION SERVICES

<p><b>1. General requirements</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Location</li> <li><input type="checkbox"/> Equipment</li> <li><input type="checkbox"/> Facilities</li> <li><input type="checkbox"/> Services</li> <li><input type="checkbox"/> Personnel</li> <li><input type="checkbox"/> Procedures</li> <li><input type="checkbox"/> Instructions</li> <li><input type="checkbox"/> Working forms</li> <li><input type="checkbox"/> Reference materials</li> <li><input type="checkbox"/> Supplies</li> </ul> <p><b>2. Location</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Convenience to (Registrants, personnel)</li> <li><input type="checkbox"/> Single, multiple services</li> <li><input type="checkbox"/> Accessible</li> <li><input type="checkbox"/> Practical</li> <li><input type="checkbox"/> Suitable</li> <li><input type="checkbox"/> Adequate</li> <li><input type="checkbox"/> Attractive</li> <li><input type="checkbox"/> Clearly designated</li> <li><input type="checkbox"/> Well-lighted</li> <li><input type="checkbox"/> Well-ventilated</li> </ul> <p><b>3. Height of work area</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Floor level</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Platform</li> </ul> <p><b>4. Platform</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Size</li> <li><input type="checkbox"/> Height</li> <li><input type="checkbox"/> Attractively covered</li> <li><input type="checkbox"/> Safety precautions (Adequate size, adequate space of walk, floor coverings fastened, wiring covered and stairs-level changes - guard rails/other - hand rails - warning signs)</li> </ul> <p><b>5. Work space classification</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Registration</li> <li><input type="checkbox"/> Ticket sales</li> <li><input type="checkbox"/> Information</li> <li><input type="checkbox"/> Membership</li> <li><input type="checkbox"/> Emergency housing</li> <li><input type="checkbox"/> Messages</li> <li><input type="checkbox"/> Hospitality</li> <li><input type="checkbox"/> Transportation</li> <li><input type="checkbox"/> Publications, materials</li> <li><input type="checkbox"/> Press relations</li> <li><input type="checkbox"/> Photograph orders</li> <li><input type="checkbox"/> Secretarial</li> <li><input type="checkbox"/> Personal shopping</li> </ul>
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## CHECK LIST/REGISTRATION, INFORMATION SERVICES (Cont.)

- Baby sitting
- 6. Determination of required facilities, equipment, services**
  - Use
  - Convenience to (Registrants, personnel)
  - Availability
  - Practicability
  - Adequacy
  - Appearance
  - Cost
- 7. Facilities, equipment, services specifications**
  - Quantity
  - Description
  - Special requirements
  - Delivery date
  - Period of time needed
  - Receipts, releases
  - Personnel contact
- 8. Furniture**
  - Chairs
  - Counters
  - Desks (Standard, typewriter)
  - Shelves
  - Tables (Straight, typewriter, lounge, counter)
- 9. Registrants' writing desks, counters placed far enough away from personnel work area to**
  - Avoid bottlenecks
  - Expedite work
- 10. Lighting**
  - Regular
  - Special (Floor lamps, spots)
  - Check (Adequacy, glare reflections)
- 11. Telephones**
  - Number
  - Charges (Installation, per call)
  - Location
  - Length of cord
  - Service (Private line, hotel switchboard, continuous/start-stop, personnel contact)
  - Use (Regulations, restrictions, personnel, registrants)
  - Special service (Expedited, meeting periods - incoming calls/outgoing calls, exhibit periods - incoming calls/outgoing calls)
  - Handling procedures
- (Messages, special charges)
- 12. Notices, display equipment**
  - Blackboards (Chalk, erasers)
  - Bulletin boards
  - Easels
  - Standards
  - Fasteners (Thumbtacks, clips, removable adhesive type tape)
- 13. Signs**
  - Clearly worded
  - Prominently displayed
- 14. Housekeeping supplies**
  - Ash trays, matches
  - Waste baskets
  - Water - fresh, cold (Fountains, paper cups, glasses)
- 15. Office machines**
  - Adding machines
  - Cash registers
  - Duplicating equipment
  - Teletype
  - Typewriters
  - Other
- 16. Office supplies**
  - Adhesive type tape
  - Alphabetical indexes
  - Carbon paper
  - Cash drawers
  - Date stamps
  - File boxes
  - Handy tool kit
  - Ink stamp pads
  - Number counter
  - Numbering machine
  - Paper clips
  - Pencil sharpener
  - Pens, pencils (Regular, colored)
  - Rubber bands
  - Ruler, tape measure
  - Scissors, knife edge
  - Stapler, staples
  - Stationery (Masthead, plain - standard/thin)
  - Typewriter supplies (Ribbons, erasers, shields)
- 17. Storage facilities**
  - General
  - Locked area
  - Safe deposit box
  - Safe deposit vault

## CHECK LIST/REGISTRATION, INFORMATION SERVICES (Cont.)

- |  |   |
|--|---|
| <p><input type="checkbox"/> Security</p> <p><b>18. Personnel</b></p> <p><input type="checkbox"/> Source</p> <p><input type="checkbox"/> Work classifications</p> <p><input type="checkbox"/> Time schedule</p> <p><input type="checkbox"/> Cost</p> <p><input type="checkbox"/> Instructions</p> <p><input type="checkbox"/> Management control</p> <p><b>19. Personnel sources</b></p> <p><input type="checkbox"/> Convention bureau</p> <p><input type="checkbox"/> Hotel</p> <p><input type="checkbox"/> Organization</p> <p><input type="checkbox"/> Outside business firms</p> <p><b>20. Personnel work classifications</b></p> <p><input type="checkbox"/> Cashiering</p> <p><input type="checkbox"/> Clerical</p> <p><input type="checkbox"/> Messenger</p> <p><input type="checkbox"/> Organization contact<br/>(Instructions, policy decisions, organization information, supervision)</p> <p><input type="checkbox"/> Registration</p> <p><input type="checkbox"/> Secretarial</p> <p><input type="checkbox"/> Typing</p> <p><b>21. Personnel time schedule</b></p> <p><input type="checkbox"/> Days</p> <p><input type="checkbox"/> House - number starting, stopping<br/>(Regular, overtime, break periods - meals/relief)</p> <p><b>22. Personnel cost</b></p> <p><input type="checkbox"/> Rate by job type<br/>(Regular time, overtime, Sundays, holidays)</p> <p><input type="checkbox"/> Payment<br/>(By whom paid, to whom paid - direct/indirect, time of payment)</p> <p><input type="checkbox"/> Special allowances<br/>(Meals, travel, parking)</p> <p><b>23. Personnel management control</b></p> <p><input type="checkbox"/> Detailed instructions<br/>(Prepared, distributed, copies on hand)</p> <p><input type="checkbox"/> Pre-event briefing</p> <p><input type="checkbox"/> Management contact</p> <p><input type="checkbox"/> Periodic checkup</p> <p><input type="checkbox"/> Post-event review</p> <p><b>24. Outline of detailed instructions for personnel</b></p> <p><input type="checkbox"/> Service classification<br/>(Purpose, scope)</p> <p><input type="checkbox"/> Job assignment</p> <p><input type="checkbox"/> Working material - listed, explained<br/>(Forms, reference materials, distribution materials, supplies)</p> <p><input type="checkbox"/> Procedures<br/>(Advance service, follow-up, current service)</p> <p><input type="checkbox"/> Files, records required</p> <p><input type="checkbox"/> Personnel check-in, out procedures</p> <p><b>25. Registration-general</b></p> <p><input type="checkbox"/> Procedures setup</p> | <p><input type="checkbox"/> Eligibility</p> <p><input type="checkbox"/> Classifications</p> <p><input type="checkbox"/> Fees, charges</p> <p><input type="checkbox"/> Forms</p> <p><input type="checkbox"/> Reports, records</p> <p><input type="checkbox"/> Distribution materials</p> <p><input type="checkbox"/> Reference materials</p> <p><input type="checkbox"/> Supplies</p> <p><input type="checkbox"/> Personnel<br/>(Available, instructed)</p> <p><b>26. Instructions for registration personnel</b></p> <p><input type="checkbox"/> Registration requirements<br/>(Eligibility, classifications, fees - charges)</p> <p><input type="checkbox"/> Procedures</p> <p><input type="checkbox"/> Registration materials<br/>(Listed, use described)</p> <p><input type="checkbox"/> Reference aids</p> <p><input type="checkbox"/> Reports, records</p> <p><b>27. Registration classifications</b></p> <p><input type="checkbox"/> Types of membership</p> <p><input type="checkbox"/> Exhibitors</p> <p><input type="checkbox"/> Ladies</p> <p><input type="checkbox"/> Speakers</p> <p><input type="checkbox"/> Special guests</p> <p><input type="checkbox"/> Geographical</p> <p><b>28. Registration forms</b></p> <p><input type="checkbox"/> Prepared in advance</p> <p><input type="checkbox"/> Type<br/>(Same form for all, different forms - advance/current/by classification)</p> <p><input type="checkbox"/> Format<br/>(Single-multi copy, numbered - unnumbered, badge attached)</p> <p><input type="checkbox"/> Content<br/>(Preprinted material, organization name, event - name/location/dates, classifications, fees - charges, session attendance, concurrent, interest check, fill in material - name/title/business name/business-home address/event period address/classification/registration date/session - attendance)</p> <p><b>29. Badges</b></p> <p><input type="checkbox"/> Ordered in advance</p> <p><input type="checkbox"/> Suitable holders ordered<br/>(Durable - practical, pocket inserts, pin fasteners, clip fasteners, adhesive)</p> <p><input type="checkbox"/> Type<br/>(Same for all, by classifications)</p> <p><input type="checkbox"/> Size</p> <p><input type="checkbox"/> Content<br/>(Plain, preprinted material - organization/event/classification)</p> <p><input type="checkbox"/> Fill in information<br/>(Name, company, location, other)</p> <p><input type="checkbox"/> Prepared, in holders</p> |
|--|---|

## CHECK LIST/REGISTRATION, INFORMATION SERVICES (Cont.)

- (Advance, current)
- 30. Fees, charges to registrant**
- Registration fees  
(Advance, current, overall, broken down by - classifications/function)
  - Ticket sales  
(Advance, current, at the door, functions - unit price/seats - unreserved/reserved)
  - Publication sales  
(Unit price, quantity price, discounts)
- 31. Registration procedures**
- Eligibility
  - Classifications  
(Defined, reference lists, forms applicable - registration/badges/receipts)
  - Fees, charges  
(Verified, paid, payment recorded, receipt issued)
  - Registration forms  
(Availability - on counter/from clerk for fill in/filled in by clerk, information checked - advance-accurate/event address/fees - charges/current/legible/all filled in/accurate/fees - charges)
  - Badges  
(Advance - accurate/inserted in holder/advance/clerk/registrant, current - classification/content form - name/title/business name/location)
- 32. Registration card files**
- Temporary, permanent
  - Arranged for use  
(Daily registration list - individual day/cumulative, information service)
  - Types of files  
(Alphabetical - name/business connection, geographical, composite, daily, classified - registrant classifications/hotel locations of registrants)
  - Cards rubber stamped  
(Date, time, paid)
  - Data on cards  
(Tabulated, recorded, reported, cards filed, other instructions)
- 33. Registration lists**
- Timing  
(Advance, daily - by days/cumulative, post-event)
  - Information  
(Event, date, period covered, registrants)
  - Processing  
(Method, timing - pickup/delivery, format - quantity/cost)
  - Distribution  
(Timing - method/restrictions)
- 34. Registration list format**
- Arrangement  
(Alphabetical - individual name/company name/classified)
- Names of registrants  
(Last name - listed first/listed last, in full, initials - last name, nicknames)
  - Business connection
  - Titles  
(Personal, business)
  - Address  
(Business, home, event, detail required)
  - Abbreviations, words to omit
  - Usage  
(Not permitted, optional, required)
  - Guide lists  
(Abbreviations, words to omit)
- 35. Cancellations, refunds**
- Deadlines  
(Date, time, exceptions)
  - Refunds  
(Advance sales - paid sales/charge sales, current sales - paid sales/charge sales, time of payment - current/post-event - certain/dependent on - guarantees/other factors)
- 36. Funds control**
- Management contact
  - Check-in, out times  
(Pre-event, event - daily/other, post-event)
  - Cash change bank  
(Amount, change breakdown, receipt procedure, return timing)
- 37. Check cashing control**
- Purpose  
(Payment of sale, payment of sale-cash, cash)
  - For whom  
(Membership - company check/personal check, special approval)
- 38. Credit control**
- Purpose  
(Payment of sale, other)
  - For whom  
(Membership, special approval)
- 39. Funds records, reports**
- Timing  
(Daily, function, summary)
  - Detail required  
(Cash at start and end, checks total and listed, charges total and listed, inventory start and end)
  - Record, report forms  
(Listed, use explained, timing, distribution)
- 40. Security precautions**
- Cash boxes
  - Cash registers
  - Storage  
(Safety deposit box, safety deposit vault)
  - Guard service  
(Check-in and out periods, at cashier's desk, en

## CHECK LIST/REGISTRATION, INFORMATION SERVICES (Cont.)

route to storage)

### 41. Accounting precautions

- Paper stock of tickets, other (Texture/weight/other, separates easily, can be handled quickly, suitable writing surface - if required)
- Numbers in sequence (Tickets, record forms)
- Numbered items returned (Used, not usable - marked void/canceled, unused)
- No resale of numbered items and returns attached to (Refund request form, other acceptable form)

### 42. Check-in procedure

- Inventories for sale (Type - tickets/publications/other, counted, number sequence checked, recorded, receipt issued, list of unit and quantity prices checked)
- Cash change bank (Counted, receipt issued, handling instructions)

### 43. Check-out procedure

- Inventories for sale (Counted by type) (Balance recorded - numbered items by numbers and quantity, unnumbered items by quantity)
- Cash (Counted, listed by denominations)
- Checks - listed, checked (Amount, payee, payer, signed)
- Charges (Listed, checked)
- Refund requests (Listed, checked)

### 44. Ticket sales instructions

- Classifications (Advance sales, current sales, at-the-door sales, unreserved seats, reserved seats, special functions)
- Special service (Credit, refunds)
- Check-in, out procedure for cashiers
- Files, records required
- Working materials (Listed, use explained)

### 45. Ticket sales controls

- Tickets numbered, sequence checked (Numbers for sales, numbers for complimentary use)
- Tickets for sales - number count (Total) (Sold - returned by hotel covering service/returned with attached refund request or other paperwork/ (Unsold) unaccounted for)
- Complimentary tickets (Authorization, ticket stamped complimentary or both sides, name of person to whom issued typed on ticket, issued complimentary tickets listed by

function - ticket number/name of person, number count - total/issued/returned by hotel covering service/canceled/unaccounted for, not issued)

### 46. Services desks

- General services desk
- Separate service desks
- Personnel supplied by (Organization, hotel, convention bureau, outside business firms)

### 47. Emergency housing

- In hotel itself
- Hotel contacts
- Convention bureau contacts

### 48. Messages

- Handling instructions (Incoming, recording, delivery)
- Facilities, equipment, supplies (Telephones, message forms - addressed to/name of sender/date and time/message/delivery method/clerk identification)
- Delivery facilities (Posting facilities - blackboards/bulletin boards/chalk and erasers/fasteners, writing facilities, telephone, page system, hotel mail boxes, messenger service)

### 49. Distribution of materials

- Detailed instructions
- Restrictions
- Materials listed
- Charges - unit, quantity
- Records required
- Forms (Format - numbered/multiple copy, type - orders/receipts/charges/refunds)
- Delivery timing

### 50. Membership information

- Informational material
- Distribution policy
- Application forms
- Eligibility
- Policy contact

### 51. Transportation service

### 52. Secretarial service

### 53. Personal shopping service

### 54. Photographs, souvenirs

- Samples displayed
- Ordering identification
- Charges - unit, quantity
- Delivery timing
- Order forms
- Receipts

### 55. Baby sitters

## CHECK LIST/EXHIBITS

### 56. Other special services

#### 1. Exhibit space location

- Access
- Floor plan  
(Scaled, all dimensions shown)
- Area - sq. ft.  
(Total, booths, aisles)
- Obstructions - dimensions  
(Columns, lights, vents, ducts, other)
- Floor load - live,static  
(Maximum, variations)
- Floor construction material
- Ceiling height  
(Maximum, variations)
- General appearance  
(Maintenance, housekeeping)
- Ventilation - control  
(Cooling, heating)
- Lighting  
(Regular, special)
- Entrances, exits spotted - dimensions  
(Freight, registrants, other)
- Utilities  
(Accessibility, limitations)
- Other

#### 2. Access to exhibit space

- Streets
- Alleys
- Doorways
- Corridors
- Elevators
- Unloading, loading facilities
- Limitations  
(Traffic, dimensions, weight, delivery schedule, other)
- Other

#### 3. Rental charge for exhibit space

- Rate
- Coverage  
(Area, facilities, equipment, services)

#### 4. Floor plan of exhibit space

- Scaled
- All dimensions shown
- Variations shown  
(Floor load, ceiling height, obstructions)
- Entrances, exits shown
- Utilities access shown

#### 5. Booths

- Facilities, equipment, services available  
(Limitations)
- Signs  
(Booth number, exhibitor name, other)
- Booth rental rates

#### 6. Facilities, equipment, services - sources

- Organization

- Hotel
- Convention bureau
- City business firms
- Exhibitor

#### 7. Facilities, equipment services - availability, charges

- Exhibit manager's desk
- Exhibitor shipment desk
- Transportation, haulage
- Utilities
- Labor - skilled, unskilled
- Crate storage
- Signs
- Decorations
- Bulletin boards
- Food, beverages
- Florist
- Public address system
- Telephone, telegraph, message service
- Checkrooms
- Rest rooms
- Drinking fountains
- Press rooms
- Typewriters
- Stenographic service
- Duplicating facilities
- Models
- Photographs
- Parking

#### 8. Utilities

- Limitations
- Electricity  
(Characteristics, sizes of lines)
- Lighting  
(Spot, special)
- Power
- Gas
- Compressed air
- Steam
- Water
- Drain

#### 9. Booth decorations

- Wall draperies
- Rugs
- Furniture

#### 10. Signs

- Booth identification  
(Standard, special)
- Aisle identification
- Location
- Direction
- Publicity  
(Exhibit, promotional, directional, other)
- Exhibitor listing



## CHECK LIST/EXHIBITS (Cont.)

(Alphabetical, booth number)	
<input type="checkbox"/> Functional (Exhibit hours, admission notices, registration, ticket sales, other)	
<b>11. Labor</b>	
<input type="checkbox"/> Electricians	
<input type="checkbox"/> Plumbers	
<input type="checkbox"/> Carpenters	
<input type="checkbox"/> Riggers	
<input type="checkbox"/> Other skilled labor	
<input type="checkbox"/> Unskilled labor	
<b>12. Shipping, delivery</b>	
<input type="checkbox"/> Transportation facilities (Rail, air, truck, other)	
<input type="checkbox"/> Haulage - local	
<input type="checkbox"/> Shipping address	
<input type="checkbox"/> Check-in, check-out, procedure at exhibit area	
<input type="checkbox"/> Schedule of placement in, removal from booths	
<input type="checkbox"/> Storage facilities (Advanced shipments, delayed outgoing shipments)	
<b>13. Exhibit time schedule - dates, hours</b>	
<input type="checkbox"/> Exhibit space (Available for setup, must be cleared)	
<input type="checkbox"/> Shipments (Advance - must store, current - direct delivery, outgoing delayed - must store)	
<input type="checkbox"/> Exhibits (Setting up, open for inspection, dismantling)	
<b>14. Admission policy</b>	
<input type="checkbox"/> Type of admission (Open, badge, charge, other)	
<input type="checkbox"/> Classifications (Staff, exhibitors personnel, registrants, press, public)	
<input type="checkbox"/> Off-hours admission	
<input type="checkbox"/> Complaint procedure	
<input type="checkbox"/> Organization contact	
<input type="checkbox"/> Personnel in charge	
<b>15. Security guards, doorpersons - available, instructed</b>	
<input type="checkbox"/> Admission policy	
<input type="checkbox"/> Exhibit time schedule	
<input type="checkbox"/> Complaint procedure	
<input type="checkbox"/> Off-hours admission	
<input type="checkbox"/> Organization contact	
<input type="checkbox"/> Carry-out passes	
<input type="checkbox"/> Security storage area	
<b>16. Insurance, liability agreement</b>	
<input type="checkbox"/> Accident	
<input type="checkbox"/> Damage	
<input type="checkbox"/> Fire	
<input type="checkbox"/> Liability	
<input type="checkbox"/> Theft	
<input type="checkbox"/> Other	
<b>17. Union contract requirements</b>	
<b>18. Regulations</b>	
<input type="checkbox"/> Alcoholic beverage controls	
<input type="checkbox"/> Building	
<input type="checkbox"/> Exhibitor	
<input type="checkbox"/> Fire	
<input type="checkbox"/> Liability	
<input type="checkbox"/> Licenses	
<b>19. Publicity</b>	
<input type="checkbox"/> Director	
<input type="checkbox"/> Media	
<input type="checkbox"/> Press releases	
<input type="checkbox"/> Press rooms	
<input type="checkbox"/> Facilities, equipment services	
<b>20. Exhibit limitations</b>	
<input type="checkbox"/> Area	
<input type="checkbox"/> Height	
<input type="checkbox"/> Weight	
<input type="checkbox"/> Lighting	
<input type="checkbox"/> Operating displays	
<input type="checkbox"/> Noise	
<input type="checkbox"/> Food	
<input type="checkbox"/> Beverages	
<input type="checkbox"/> Personnel	
<b>21. Sale of booth space</b>	
<input type="checkbox"/> Detailed information for exhibitors	
<input type="checkbox"/> Scaled diagram of exhibit space (Booth layout shown, basic booth units only shown)	
<input type="checkbox"/> Application for space	
<input type="checkbox"/> Charges for booth space	
<input type="checkbox"/> Contract procedures	
<input type="checkbox"/> Exhibit questionnaire (Booth assignment data, servicing exhibitor data)	
<input type="checkbox"/> Acknowledgement of application	
<input type="checkbox"/> Booth assignment (Policy, time schedule, notification)	
<input type="checkbox"/> Payment procedure	
<b>22. Booth assignment policy</b>	
<input type="checkbox"/> Eligibility	
<input type="checkbox"/> Length of membership	
<input type="checkbox"/> Past participation	
<input type="checkbox"/> Time of application receipt	
<input type="checkbox"/> Competitive exhibits	
<input type="checkbox"/> Size of exhibit	
<input type="checkbox"/> Special requirements (Floor load, ceiling height, utilities)	
<b>23. Detailed information for exhibitors (brochure)</b>	
<input type="checkbox"/> Location	
<input type="checkbox"/> Dates	
<input type="checkbox"/> Purpose	
<input type="checkbox"/> Benefits	
<input type="checkbox"/> Past exhibitors listing	
<input type="checkbox"/> Exhibit management	

## CHECK LIST/EXHIBITS (Cont.)

- Exhibit time schedule
- Eligibility
- Application procedure
- Booth assignment policy
- Exhibit space detail  
(Overall diagram, location of association office, press room, registration, and information areas, booths, booth layout, basic booth units)
- Exhibit limitations
- Exhibitor costs
- Facilities, equipment, services
- Rules, regulations, licenses, policies, practices
- Shipping instructions
- Labor - skilled, unskilled
- Fire prevention
- Insurance, liability
- Program advertisement
- 24. Exhibit management contacts**
  - Organization
  - Exhibit space
  - Haulage
  - Facilities, equipment, services
  - Other
- 25. Exhibitor costs**
  - Booth space
  - Haulage - local
  - Facilities, equipment, services
  - Labor - regular, overtime
- 26. Exhibit questionnaire - data for booth assignment**
  - Product, service display
  - Booth area required
  - Location choices
- Display  
(Dimensions, weight, operating or static, special characteristics)
- Background  
(Standard, special - length and height for backwalls and sidewalls)
- Sign - identification
- Utilities required
- Special requirements
- 27. Booth assignment notice**
  - Booth identification
  - Booth layout - scaled
  - Order form  
(Facilities, equipment, services)
  - List of exhibitors  
(Alphabetical, booth number)
  - Invoice
  - Other
- 28. Exhibit questionnaire - data for servicing exhibitor**
  - Booth location
  - Exhibitor contact
  - Exhibit shipment  
(Timing, method)
  - Sign - identification  
(Standard, special)
  - Utilities
  - Labor
  - Facilities
  - Equipment
  - Services
  - Special requirements
  - Other

## CHECK LIST/MEETING SUPPORT SERVICES

### 29. Exhibit appearance

#### 1. Chairs

- Stack
- Swivel
- Upholstered
- Armchairs

#### 2. Tables

- Round - 10 ft.
- Round - 8 ft.
- Card
- Rectangular - 4 ft.
- Rectangular - 8 ft.
- Folding

#### 3. Stage

- Permanent
- Temporary
- Platforms, risers, steps
- Guard rails
- Draperies
- Carpeting

#### 4. Lighting

- Regular
- Spotlights
- Other
- Controls

#### 5. Lectern

- Floor
- Tabletop
- Microphone (attached)
- Light
- Speaker signals

#### 6. Public address system

- Mixer
- Operator
- Stationary mikes
- Portable
- Neck (lavalier)
- Floor
- Hand
- Wireless

#### 7. Teleprompter service

- Other

#### 8. Electricity

- AC/DC current

- Capacities

- Outlets, location
- Adequate extension cords

#### 9. Chalkboards

- Chalk (visible color)
- Erasers

#### 10. Chartboards

- Easels
- Extra pads
- Writing instruments

#### 11. Screens

- Fixed
- Portable
- Beaded
- Matte

#### 12. Projection Equipment

- Overhead projector
- Opaque projector
- Standard slide
- Carousel
- 16mm sound projector
- 8mm sound projector
- Filmstrip projector
- Projection table
- Extension wiring
- House lights control
- Pointer, plain
- Pointer, lighted
- VCR and television

#### 13. Projector operator

- Union requirement
- Union rates
- Minimum hours
- Overtime rates/rules

#### 14. Supplies

- Name cards
- Note pads
- Pencils
- Ashtrays
- Ice Water
- Glasses
- Flags
- Signs
- Banners

## CHECK LIST/MEETING ROOM SELECTION

- |  |  |
|--|--|
| <ul style="list-style-type: none"><li><input type="checkbox"/> Piano</li><li><b>1. Meeting rooms blocked when booking event</b><ul style="list-style-type: none"><li><input type="checkbox"/> Charges, if any</li><li><input type="checkbox"/> Number</li><li><input type="checkbox"/> Type</li></ul></li><li><b>2. Assignment of specific meeting rooms for functions</b></li><li><b>3. Hold some meeting rooms for</b><ul style="list-style-type: none"><li><input type="checkbox"/> Emergency or crisis shifts</li><li><input type="checkbox"/> Functions scheduled at last minute</li><li><input type="checkbox"/> Possible program changes</li></ul></li><li><b>4. Organization policy covering use of meeting rooms by event registrants for other than event functions.</b><ul style="list-style-type: none"><li><input type="checkbox"/> During event function hours</li><li><input type="checkbox"/> Outside of event function hours</li></ul></li><li><b>5. Condition of meeting room</b><ul style="list-style-type: none"><li><input type="checkbox"/> Clean</li><li><input type="checkbox"/> Furnishings</li><li><input type="checkbox"/> Lighting<br/>(Regular, spot, controls, mirror reflections, drapes)</li><li><input type="checkbox"/> Obstructions</li><li><input type="checkbox"/> Ventilation - control<br/>(Cooling, heating)</li></ul></li></ul> | <ul style="list-style-type: none"><li><input type="checkbox"/> Acoustics</li><li><b>6. Function time schedules</b><ul style="list-style-type: none"><li><input type="checkbox"/> Posting time of function for hotel public bulletin boards, notices</li><li><input type="checkbox"/> Ready time for meeting room</li><li><input type="checkbox"/> Signs in place<br/>(Identification, directional, other)</li><li><input type="checkbox"/> Special notices to be posted, distributed</li></ul></li><li><b>7. Prompt release of meeting rooms not to be used</b></li><li><b>8. Facilities, equipment, service</b><ul style="list-style-type: none"><li><input type="checkbox"/> Available sources<br/>(Hotel, convention bureau, outside business firms)</li><li><input type="checkbox"/> Ordered</li><li><input type="checkbox"/> Checked</li></ul></li><li><b>9. Pre-function check</b><ul style="list-style-type: none"><li><input type="checkbox"/> Setup</li><li><input type="checkbox"/> Lighting</li><li><input type="checkbox"/> Ventilation</li><li><input type="checkbox"/> Facilities, equipment, services, other</li></ul></li><li><b>10. If outside hotel</b><ul style="list-style-type: none"><li><input type="checkbox"/> Auditorium manager</li></ul></li></ul> |
|--|--|

## CHECK LIST/PRINTED MATERIALS

<p><input type="checkbox"/> Telephone</p> <p><b>1. Rules, regulations, policies, practices</b></p> <p><input type="checkbox"/> Organization (Staff, registrants, hotel, convention bureau, outside business firms)</p> <p><input type="checkbox"/> Hotel</p> <p><input type="checkbox"/> Convention Bureau</p> <p><input type="checkbox"/> Union contracts</p> <p><b>2. Preparation</b></p> <p><input type="checkbox"/> Sources (Organization, hotel, convention bureau, outside business firms)</p> <p><input type="checkbox"/> Timing (Advance, on-the-spot)</p> <p><input type="checkbox"/> Charges</p> <p><input type="checkbox"/> Ordered</p> <p><input type="checkbox"/> Delivered</p> <p><b>3. Printing</b></p> <p><input type="checkbox"/> Event program</p> <p><input type="checkbox"/> Badges</p> <p><input type="checkbox"/> Guest program</p> <p><input type="checkbox"/> Youth program</p> <p><input type="checkbox"/> Social program</p> <p><input type="checkbox"/> Forms (Registration, acknowledgements, ticket orders)</p> <p><input type="checkbox"/> Transportation schedules</p> <p><input type="checkbox"/> Tickets</p> <p><input type="checkbox"/> Trade Show program</p> <p><input type="checkbox"/> Invitations</p> <p><input type="checkbox"/> Promotional materials</p> <p><input type="checkbox"/> Menus</p> <p><b>4. Location</b></p> <p><input type="checkbox"/> Accessible</p> <p><input type="checkbox"/> Appropriate</p> <p><input type="checkbox"/> Doorways clean</p> <p><input type="checkbox"/> No bottlenecks</p> <p><input type="checkbox"/> Permissible</p> <p><input type="checkbox"/> Visible</p> <p><b>5. Posting</b></p> <p><input type="checkbox"/> Bulletin boards</p> <p><input type="checkbox"/> Easel, standards</p> <p><input type="checkbox"/> Hanging facilities (Equipment, labor)</p> <p><input type="checkbox"/> Fastenings (Accessible)</p> <p><input type="checkbox"/> Permissible types (Adherent tapes, thumbtacks, nails)</p> <p><b>6. Sign display schedule</b></p> <p><input type="checkbox"/> Personnel instructed</p> <p><input type="checkbox"/> Period of display (Event period, specific function, special notices)</p> <p><input type="checkbox"/> Posting time</p> <p><input type="checkbox"/> Removal time</p> <p><b>7. Procedural setup</b></p>	<p><input type="checkbox"/> Ordering</p> <p><input type="checkbox"/> Delivery</p> <p><input type="checkbox"/> Posting</p> <p><input type="checkbox"/> Distribution</p> <p><input type="checkbox"/> Payment</p> <p><input type="checkbox"/> Proofreading</p> <p><b>8. Type</b></p> <p><input type="checkbox"/> Purpose</p> <p><input type="checkbox"/> Size</p> <p><input type="checkbox"/> Format</p> <p><input type="checkbox"/> Readability</p> <p><input type="checkbox"/> Quantity</p> <p><input type="checkbox"/> Timing</p> <p><input type="checkbox"/> Production method</p> <p><input type="checkbox"/> Charges</p> <p><b>9. Purpose</b></p> <p><input type="checkbox"/> Direction, identification</p> <p><input type="checkbox"/> Information</p> <p><input type="checkbox"/> Personal identification</p> <p><input type="checkbox"/> Publicity, advertising</p> <p><input type="checkbox"/> Other</p> <p><b>10. Publicity, advertising</b></p> <p><input type="checkbox"/> Event (General, functions, special events, special services)</p> <p><input type="checkbox"/> Nature of business (Purpose, services, membership, other)</p> <p><b>11. Direction, identification</b></p> <p><input type="checkbox"/> Functions</p> <p><input type="checkbox"/> Meeting rooms (Exhibits, sessions, food functions, social events, special events)</p> <p><input type="checkbox"/> Special services (Information - organization/hotel/convention bureau/other, registration, ticket sales)</p> <p><input type="checkbox"/> Headquarters (Office)</p> <p><input type="checkbox"/> Press headquarters</p> <p><input type="checkbox"/> Hospitality (General, ladies, special groups)</p> <p><b>12. Personnel identification</b></p> <p><input type="checkbox"/> Method (Badges - standard/classified, name cards)</p> <p><input type="checkbox"/> Staff (Organization, hotel, convention bureau, other)</p> <p><input type="checkbox"/> Special service personnel</p> <p><input type="checkbox"/> Registrants</p> <p><b>13. Speaker identification</b></p> <p><input type="checkbox"/> Timing (Event period, when speaking, for conferences)</p> <p><input type="checkbox"/> Method (Badge, name card)</p> <p><input type="checkbox"/> Now-speaking signs</p>
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## CHECK LIST/PRINTED MATERIALS (Cont.)

- |  |  |
|--|--|
| <p><b>14. Distribution - time, place</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Public areas</li> <li><input type="checkbox"/> Event areas<br/>(Registration desk, information desks, headquarters - office/ hospitality)</li> <li><input type="checkbox"/> Meeting rooms<br/>(Placed on audience chairs/display table or rack, handed out when entering/during/leaving)</li> </ul> <p><b>15. Distribution personnel - instructed</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Staff</li> <li><input type="checkbox"/> Registration clerks</li> <li><input type="checkbox"/> Information clerks</li> <li><input type="checkbox"/> Hotel mail clerks</li> <li><input type="checkbox"/> Bell boys</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Special messengers</li> <li><input type="checkbox"/> Housemen</li> <li><input type="checkbox"/> Waiters</li> <li><input type="checkbox"/> Other</li> <li><input type="checkbox"/> Charges</li> </ul> <p><b>16. Special notices, materials</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Displays</li> <li><input type="checkbox"/> Informational materials, records<br/>(Subject, statistics, finances, accounting)</li> <li><input type="checkbox"/> Messages</li> <li><input type="checkbox"/> Personnel instructed</li> <li><input type="checkbox"/> Schedule of events<br/>(Ready time, posting time)</li> </ul> |
|--|--|

## CHECK LIST/GRATUITIES

- |  |  |
|--|--|
| (Name card, time indicator, placement of sign)   |  |
| <p><b>1. Consult</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Hotel executives</li> <li><input type="checkbox"/> Convention bureau representative</li> <li><input type="checkbox"/> Colleagues<br/>(other than meeting planners)</li> <li><input type="checkbox"/> Tourist board</li> <li><input type="checkbox"/> Event services manager</li> <li><input type="checkbox"/> Your own organization's policies</li> <li><input type="checkbox"/> Concerned unions</li> </ul> <p><b>2. Kinds of payment</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Additional gifts for special service</li> <li><input type="checkbox"/> All gratuities voluntary</li> <li><input type="checkbox"/> Automatic percentage added to bill</li> </ul> <p><b>3. How distributed (other than automatic charge on bill)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Given out individually</li> <li><input type="checkbox"/> Given to "head" person for further distribution</li> </ul> <p><b>4. When distributed</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Before meeting starts</li> <li><input type="checkbox"/> After meeting closes</li> </ul> <p><b>5. Budgeting</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Amount "per head"</li> <li><input type="checkbox"/> Percentage of total bill</li> </ul> <p><b>6. Paperwork for tax purposes and company financial records</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Receipt from recipient(s), name, service rendered, nature of gratuity, amount of gratuity</li> </ul> <p><b>7. Who should be included (possibles)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Airport luggage handlers</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Bartenders</li> <li><input type="checkbox"/> Bellpeople</li> <li><input type="checkbox"/> Captains</li> <li><input type="checkbox"/> Cartage people</li> <li><input type="checkbox"/> Catering manager</li> <li><input type="checkbox"/> Chef and staff</li> <li><input type="checkbox"/> Clean up crew</li> <li><input type="checkbox"/> Cocktail waiters</li> <li><input type="checkbox"/> Doorpeople</li> <li><input type="checkbox"/> Drivers</li> <li><input type="checkbox"/> Food and beverage manager</li> <li><input type="checkbox"/> House people (set-up and tear-down)</li> <li><input type="checkbox"/> Maids</li> <li><input type="checkbox"/> Maitre d'</li> <li><input type="checkbox"/> Room service waiters (for hospitality functions)</li> <li><input type="checkbox"/> Sommeliers (wine stewards)</li> <li><input type="checkbox"/> Taxi or bus drivers</li> <li><input type="checkbox"/> Telephone operators</li> <li><input type="checkbox"/> Waiters</li> </ul> <p><b>8. Basis for distribution</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Demands you place on service people</li> <li><input type="checkbox"/> Duration of event or meeting</li> <li><input type="checkbox"/> Exhibits</li> <li><input type="checkbox"/> Number in attendance</li> <li><input type="checkbox"/> Number of food and beverage functions</li> <li><input type="checkbox"/> Number of meeting rooms used and complexity of set-up</li> </ul> <p><b>9. Thanks other than cash</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Gift</li> </ul> |

## CHECK LIST/EVALUATION

- Letter
- 1. From your own records**
- 2. Registration (compare with last year and last five years)**
  - Total paid registrations
  - Pattern arrivals, departures
  - Number prepaid
  - Date of pre-payment
  - Date of registration
  - Number spouses attending
  - Total number rooms used, by type
  - Number of no-shows
  - Volume of room service used by registrants
  - Volume of public dining service used by registrants
  - Other financial benefit to hotel, city
  - Number of hospitality suites (private but meeting-connected as well as "official")
- 3. Ticketed functions**
  - Attendance
  - Number prepaid
  - Date of pre-payment
  - Date of registration
- 4. Costs**
  - On budget
  - Over budget
  - Under budget
- 5. Deadlines**
  - Met
  - Not met
- 6. From attendees' questionnaire replies:**
  - Arrangements**
    - Pre-event publicity early enough
    - Prices in line with capacity to pay
    - Program inviting
    - Registration forms simple, understandable
    - Sufficient site information
    - Transportation options clear, attractive
  - Transportation**
    - City and hotel accessible
  - Sessions accessible
  - Shuttle service efficient, well-timed
- Registration**
  - Quick, efficient, courteous
- 7. Hotel**
  - Rooms attractive, clean, comfortable
  - Food tasty, well served, promptly served, hours convenient
  - Elevator service adequate
- 8. Personnel**
  - Courteous
  - Efficient
  - Good appearance
- 9. Meeting set-up**
  - Prompt
  - Competent
  - Efficient
  - (Courteous, adequate equipment)
- 10. Meeting rooms**
  - Accessible
  - Appropriate
  - Attendance quality
  - Availability of outside suppliers
  - Ceiling heights, load capacities suitable
  - Comfortable
  - Easy to find
  - Exhibitor quality
  - Hours (satisfactory to exhibitors, attendees)
  - Properly equipped
  - Security
  - Traffic flow
  - Well-equipped
- 11. Program**
  - Appropriate level
  - Did you learn, change, understand as a result?
  - Format
  - Informative
  - Interesting
  - Speaker quality

## CHECK LIST/PROMOTION, PUBLICITY

<p><b>1. City, information, literature, photographs</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Points of interest</li> <li><input type="checkbox"/> Recreational facilities</li> <li><input type="checkbox"/> Special events</li> </ul> <p><b>2. Hotel - information, literature, photographs</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Accommodations</li> <li><input type="checkbox"/> Meeting rooms</li> <li><input type="checkbox"/> Exhibit space</li> <li><input type="checkbox"/> Facilities, equipment, services</li> <li><input type="checkbox"/> Public dining rooms</li> <li><input type="checkbox"/> Entertainment</li> <li><input type="checkbox"/> Recreational facilities</li> </ul> <p><b>3. Promotion sources</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Organization</li> <li><input type="checkbox"/> Hotel</li> <li><input type="checkbox"/> Auditorium</li> <li><input type="checkbox"/> Convention bureau</li> </ul> <p><b>4. Organization - promotion, publicity</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> General information (Organization, city, hotel, transportation facilities, special features)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Program</li> <li><input type="checkbox"/> Speakers</li> <li><input type="checkbox"/> Features</li> <li><input type="checkbox"/> Exhibit</li> <li><input type="checkbox"/> Entertainment</li> </ul> <p><b>5. Public, press relations</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Advance copies of speeches</li> <li><input type="checkbox"/> Organization photographs</li> <li><input type="checkbox"/> Prepared newsworthy press releases</li> <li><input type="checkbox"/> Press rooms (Registration area, desks, writing supplies, typewriters, stenographic service, duplicating equipment or service, telephones and/or special lines, telegraph, coat racks, fresh ice water, glasses or paper cups, ashtrays and matches)</li> <li><input type="checkbox"/> Publicity media contacts (Newspapers, wire services, newsreels, radio, television)</li> </ul>
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## CHECK LIST/FARM VISIT

<p><b>1. Goals of Farm Visit</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Introduce the versatile Arabian to your neighbors.</li> <li><input type="checkbox"/> Encourage family involvement with Arabians.</li> <li><input type="checkbox"/> Introduce your activities involving Arabians.</li> <li><input type="checkbox"/> Cultivate prospective buyers.</li> <li><input type="checkbox"/> Just have fun.</li> <li><input type="checkbox"/> Educate in areas of training, handling, caring for, or about the Arabian Horse.</li> </ul> <p><b>2. Type of Audience</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Other Arabian owners.</li> <li><input type="checkbox"/> Persons who have other breeds of horses.</li> <li><input type="checkbox"/> Persons who do not have horses but might desire to own some.</li> <li><input type="checkbox"/> Youth groups, 4-H, FFA, etc.</li> <li><input type="checkbox"/> Friends and neighbors.</li> </ul> <p><b>3. Inspection of Facilities</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Do you have a ring or arena with bleachers?</li> <li><input type="checkbox"/> Need rental rest room facilities?</li> <li><input type="checkbox"/> Will you be able to show slides or videos?</li> <li><input type="checkbox"/> Do you need to rent a tent?</li> <li><input type="checkbox"/> Registration area to record names and addresses, give out name tags, etc.</li> <li><input type="checkbox"/> Will admission be free or will you charge a nominal fee?</li> </ul>	<p><b>4. Selection of Event Date and Rain Date</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Avoid conflict with other horse events.</li> <li><input type="checkbox"/> Select a day when your audience would be free to attend.</li> </ul> <p><b>5. Selection of Theme</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Arabian racing.</li> <li><input type="checkbox"/> Showing of Arabians.</li> <li><input type="checkbox"/> Work horse, demonstrate cutting and pleasure horse events. Maybe offer free rides for youngsters under six.</li> </ul> <p><b>6. Selection of Food</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> If your Visit runs through mealtime, will you provide food?</li> <li><input type="checkbox"/> Full meal or snacks? Beverage?</li> <li><input type="checkbox"/> Charge for meal? Some Visits charge and give proceeds to the organization.</li> <li><input type="checkbox"/> Some farms have invited neighbor Arabian owners for a dinner the night before and had the Farm Visit for the public the next day.</li> <li><input type="checkbox"/> Determine how to make reservations for a meal. (Usually they will attend if they pay for the meal.)</li> </ul>
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## CHECKLIST/FARM VISIT (Cont.)

### 7. Publicity

- Print a flier, post it at the feed store, tack shop, arenas, etc. Be sure it has response coupon. Leave several at stores and tack shops. Mail flier to roster of persons you especially want to attract.
- Distribute news release two weeks in advance to local papers, five days in advance to radio and TV stations.
- Send flier to veterinary equine clinics.
- Have someone announce at local club meeting.
- Call your personal friends.
- Arrange for a news photographer to take pictures.
- Have someone video the exciting portion of the program.
- You may want to seek sponsors such as veterinary clinics, Arabian horse club or tack shop. They can share promotion efforts and/or other costs.

### 8. Exploring Programs

- Invite an outside expert, someone more than 50 miles away.
- Use a trainer, either racing or showing.
- Feature college professor.
- Ask a veterinarian to discuss form and function.
- Invite a board member to speak.
- Use several horses for demonstrations of points.

- Use a video.
- Display a heritage scrapbook.
- Plan entertainment, such as music during meal, or concert before a program. (Don't let entertainment replace horse information.)
- Order hand-out materials

### 9. Day of Program

- Arrange for a pleasant welcome from farm owner.
- Start on time. Adjourn at announced hour.
- You may want to have simple printed program of day of events.
- At conclusion, distribute an evaluation sheet, asking which portion of program audience liked best, what else they would have enjoyed, etc.

### 10. Follow-up

- Phone those who have indicated an interest and ask their opinion of the program.
- Send a brief written report to your Regional Director, outlining highlights.
- Would you attend another?

On behalf of AHA  
and the  
Competition Advisory Committee,  
we hope this manual will be of assistance in  
helping you with your event.

This booklet will be a work in progress and if  
there is anything you feel would be helpful, please  
do not hesitate to ask. We are willing to help  
you make your event successful!

GOOD LUCK !

**THE END**

