



## Annual Business Meeting Checklist

### **12 months before the meeting:**

- Contract with the parliamentarian (procedural expert) and establish the scope of services and a time line.
- Compile issues requiring further decisions or discussions, including items from other meetings.
- Schedule a conference call to discuss overall strategies and adjustments for the upcoming meeting.

### **9 months before the meeting:**

- Connect committees with the parliamentarian to monitor the progress of resolutions and bylaws amendments for content, formatting, and editing.
- Establish responsibilities and final deadlines for notices, print production, and important tasks.

### **6 months before the meeting:**

- Arrange the first production meeting with the parliamentarian, audio-visual vendor, and keypad vendor to make the initial technical decisions.
- Schedule delegate training webinar dates.
- Convene rules committee to review and revise annual meeting rules.

### **3 months before the meeting:**

- Finalize the bylaws amendments, resolutions, committee and officer reports, other business, and create the draft agenda.
- Assign support tasks, such as timekeepers, tellers, and screen typists.
- Schedule an initial meeting between the president (presiding officer) and the parliamentarian to discuss the meeting flow and potential problems.

### **On site:**

- Conduct the final script review with officers, staff, and parliamentarian, making changes as necessary. Make final script edits and distribute.