

# Checklist for Meeting Planners

## Site/Hotel Selection

### Basic Elements

- ☐ Identify both contract parties, date of agreement, name and date of meeting event.
- ☐ Address insurance requirements (liquor liability, negligence, etc.)
- ☐ Include change of ownership and management notification requirement.
- ☐ Indemnification clause should state that hotel will pay legal fees and judgments against meeting group if the group is sued by another party for something that is the hotel's fault and vice versa.

### Deposits, Termination, and Cancellation

- ☐ Include termination clause that spells out the conditions beyond a group's control that may force cancellation of event (war, fire, labor strikes, and acts of God such as hurricanes or earthquakes)
- ☐ Deposits: state amount and specify that if held over six months, the money should be placed in an interest-bearing escrow account and interest credited to group account.
- ☐ Cancellation penalty: specify financial damages to be paid by group should event be canceled (fixed dollar amount or sliding scale), less any revenue generated from the resale of canceled rooms.

### Guest/Sleeping Rooms

- ☐ Specify number of singles, doubles and suites needed for each day of the meeting.
- ☐ Specify type of rooms (ADA accessible, ocean view, etc.) needed for each night.
- ☐ Show total room nights.
- ☐ Describe the hotel's procedures for guaranteeing reservations.
- ☐ Specify check-in and checkout times and spell out any restrictions or conditions.
- ☐ Cut-off dates: identify how long before the meeting the hotel can sell off unreserved rooms in the room block.

- ☐ State how reservations will be handled. Ask the hotel to clarify policy for reservations received after cut-off date or exceeding available block.
- ☐ Require notification by hotel if room block is exceeded.
- ☐ Include a clause permitting reductions or additions to room block without penalty.
- ☐ Overbooking: state compensation for confirmed guest denied a room.
- ☐ Room rates: list current rates by type of room and determine formula and date for setting meeting rates (particularly if booking meetings more than one year out).
- ☐ Commission: show amount and to whom commission is payable.
- ☐ Complimentary rooms: state formula for determining allotment and request credit to master account if not used.
- ☐ List complimentary in-room amenities (phone, pay TV, newspaper, fax, computer terminal).
- ☐ List complimentary VIP amenities (golf, tennis, parking, health club, etc.), whenever possible, state recipients.

#### **Meeting/Function Space Requirements**

- ☐ Identify meeting rooms by name.
- ☐ Specify types of groups (for instance, a corporate competitor) that should not meet at the hotel at the same time as your group.
- ☐ Specify your group's ADA requirements.
- ☐ Spell out signage requirements.

#### **Food and Beverage**

- ☐ Specify time and rates for each meal function.
- ☐ List dates for final guarantee of each event and liability if attendance is lower than expected or meal is canceled.
- ☐ Specify gratuity policy (voluntary vs. mandatory).
- ☐ Confirm compliance with state liquor laws.

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