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| **November** | Assign To | Completed | Task |
| ASG | ✓ | Get draft proposals from facilities and present to the board for approval. |
| ASG | ✓ | Finalize contract with facility and send in deposit-secure room block |
| ASG |  | Create to-do list and function sheet 🡪 will send to president, Hilton |
| ASG/JS | ongoing | Work with Sponsorship Chair to secure sponsors-enter sponsorship, generate invoice, send with letter |
| ASG |  | Prep Board meeting agenda for 3/15 🡪 send draft to Larry by 2/1; ask about dinner reservation |
| **December** | ASG/JC |  | Begin working on brochure |
| **January** | ASG/JC/CS |  | Finalize brochure and complete mailing-put on MMA website, MTCMA website & send out to Staff Business 🡪 send to sponsors upon completion |
| **February** | ASG |  | Draft confirmation and get correct directions to facility. |
| ASG |  | Order LL Bean Gift Certificate for Evaluation Drawing ($50) 🡪 ask group!Order $200 LL Bean GC for CO speaker |
| JS | ✓ | Save the date postcards for the Institute-have drafted |
| ASG |  | Send out meeting notice for board members with agenda  |
| JS/CS | 1/15 | Set up Interchange product in Personify and test 🡪 need brochure |
| CS | All set | Set up Registration binder |
| ASG |  | Register Speakers and send out speaker letters |
| ASG/JS | 1/15 | Contact sponsors re: table, presentations; register representatives |
| ASG |  | Send out facility letter/function sheet |
| JS/ASG | 1/26 – 1/29 for hard copies | Send out email blast – hard copies to members without email and also to sponsors |
| CS | ongoing | Enter and proof all registrations. |
| ASG/JC |  | Draft All signage: name badge template, sponsor poster, packet labels, reserved signs, door registration form |
| JS | 1/26 | Order Speaker ribbons, badge holders, gold stars for certified managers, new member ribbons (as of July of previous year), green dots for 1st time attendees |
| ASG |  | Request ICMA member stickers and credentialed manager ribbons from ICMA contact for name badges |
| ASG |  | Senior Advisers/Ambassadors: contact Bert Kendall to find out if they are having a meeting/reserved table, and draft table plaque for meeting. |
| JS | 2/16 – done 2/20 | Make sure all sponsors are paid-if not, let sponsorship chair or president know to make follow up phone calls.  |
| ASG/JC/JS | 3/5 – done 3/5 JS | Order Sponsor sign. (2’x3’ foam core color) from Quality Copy-Have Jaime draft. |
| ASG/JS | 3/5 – done 3/2 ASG | Draft sample attendee packet-agenda, evaluation, pad of paper, attendee list (with email addresses and phone numbers), Save the Date Postcard for Institute and any handouts/PPTs from speakers, speaker bios |
| JS/CS | 3/8 | Stuff name badges with stickers and ribbons |
| JS | 3/9 | Send out confirmations one week prior to event with directions. |
| JS/CS | 3/09 | Prep attendee certificates |
| JS/CS | 3/09 | Prep door prizes/giveaways (complimentary certificates) |
| ASG |  | Release room block 🡪 March 1st |
| JS/CS | 3/09 | Have all packets made up (15 extra for door registrations) |
| JS | 3/12 | Save presentations on flash drive |
| ASG |  | Prep notes for Larry |
| ASG |  | Organize Interchange binder |
| ASG | 3/9 | Send out meeting attachments to Board |
| ASG & MW | 3/14 | Week of event: start event boxes and pack the following:Registration folder:Membership List by Pay Status x 1Attendee List x 2Sponsor List x 1Receipt BookReceipt FormsDoor Registration FormsBlue supply box (make sure fully stocked)Special folder for President, VP, Chair:Attendee ListSponsor ListList of New Members since JulyAttendee packet informationFor registration table:Citizen Education Items – half sheet, MMA bookmarksCompleted Name Badges with raffle tickets for door prizesContainer for raffle ticketsEvaluation boxMembership ApplicationsCode of EthicsCertification FormsMembership Brochures - updatedPublication FormsExtra Evaluation FormsUpcoming Workshop Brochures – Institute Save the DatesMMA Training CatalogUpdated Goals & Mission handoutHelpful Hints handbook - updatedPensFinal Attendee Packets |
| **April** | JS | ongoing | Send thank you letters to sponsors – as needed |
| JS | 3/23 | Complete evaluation summary for Interchange and email to chair. |
| **September** | ASG |  | Find out from chair names of facilities to market for the next Interchange and begin to secure proposals. |
| **October** | ASG |  | Work on summarizing proposals to give to the board for review in November. |