

# Meeting/Training Protocol & Checklist

## **Off Premise meeting/trainings – date and tentative agenda to WU**

- 45 day minimum for initial meeting notice with tentative agenda and request for catering.
  - 30 day meeting reminder emailed to invitees
  - 20 day meeting reminder emailed to invitees
  - 10 day meeting reminder emailed to invitees
    - 7 day minimum for meeting materials to Associates
    - 2 day minimum for final number for food

## **On Premise meeting/trainings – date & tentative agenda to WU**

- 30 day minimum for initial meeting notice with tentative agenda and request for catering.
  - 20 day meeting reminder emailed to invitees
  - 10 day meeting reminder emailed to invitees
    - 7 day minimum for completed checklist and meeting materials to Associates
    - 2 day minimum for final menu/# attending/delivery schedule of food if catered
      - If a request is not made for catering – food will be ordered the day of event at staff discretion.

## **Checklist for meeting/training (please check and/or circle)**

- Room Setup – table arrangement – room divider  
Theater style – small conversation groupings – rectangle - square
  
- Technology – projector – laptop(s) – audio (requests for multiple laptops require 2 week notice)
  
- Meeting materials – include all handouts with completed checklist
  
- Newsprint – Notepaper – Nametags – Sign-In Sheet – Thank You Cards
  
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**\*Note – If you plan on using WU technology for a presentation, please check with office staff to confirm your file is compatible with WU equipment.**