

NABIP Chapter Meeting Preparation Checklist

Roles & Responsibilities

2–4 Weeks Before the Meeting

Task	Primary Responsibility
Confirm meeting date, time, and location/virtual platform	President (or Executive Director / Administrator, if applicable)
Develop the meeting agenda	President
Solicit agenda items from officers and committee chairs	President
Submit agenda items and reports	All Officers & Committee Chairs
Determine whether any motions or votes will be presented	President with officers
Review outstanding action items	President & Secretary
Confirm guest speakers or presenters	President or Professional Development Chair
Coordinate meeting logistics (room, Zoom, catering, etc.)	Administrator/Executive Director or President-Elect/Vice President

One Week Before the Meeting

President

- ☐ Finalize the agenda.
- ☐ Review officer and committee reports.
- ☐ Prepare the President's report.
- ☐ Review any motions requiring Board or membership action.
- ☐ Coordinate with presenters and guest speakers.

Secretary

- ☐ Prepare the previous meeting's minutes.
- ☐ Verify the meeting notice has been distributed in accordance with the bylaws.

- ☐ Prepare attendance/sign-in materials.
 - ☐ Confirm quorum requirements.
 - ☐ Prepare any correspondence requiring Board attention.
-

Treasurer

- ☐ Prepare the financial report.
 - ☐ Review the current budget.
 - ☐ Prepare any financial recommendations or motions.
 - ☐ Verify account balances.
-

President-Elect/Vice President

- ☐ Coordinate meeting logistics.
 - ☐ Assist with meeting preparation.
 - ☐ Confirm presenters.
 - ☐ Arrange volunteer support, if needed.
 - ☐ Be prepared to preside if the President is unavailable.
-

Committee Chairs

- ☐ Prepare committee reports.
 - ☐ Identify any action items.
 - ☐ Notify the President of any motions requiring Board approval.
 - ☐ Prepare supporting materials.
-

Administrator/Chapter Executive (if applicable)

- ☐ Distribute the meeting notice.
- ☐ Distribute the agenda and supporting materials.
- ☐ Coordinate meeting room or virtual platform.

- ☐ Prepare name badges, handouts, or meeting packets.
 - ☐ Confirm audiovisual equipment.
 - ☐ Manage RSVPs.
-

2–3 Days Before the Meeting

President

- ☐ Review the final agenda.
 - ☐ Meet briefly with officers if necessary.
 - ☐ Review any parliamentary questions.
 - ☐ Confirm everyone understands their responsibilities.
-

Secretary

- ☐ Bring:
 - Minutes
 - Attendance roster
 - Bylaws (if needed)
 - Current roster of officers
 - Motion log (if maintained)
-

Treasurer

- ☐ Bring the financial report and supporting documents.
 - ☐ Prepare to answer financial questions.
-

Committee Chairs

- ☐ Bring any presentation materials.
 - ☐ Prepare concise verbal reports (generally 2–5 minutes).
-

Day of the Meeting

President

- ☐ Arrive early.
 - ☐ Meet with officers.
 - ☐ Review the agenda one final time.
 - ☐ Welcome speakers and guests.
 - ☐ Verify a quorum with the Secretary before calling the meeting to order.
-

Secretary

- ☐ Set up attendance tracking.
 - ☐ Record attendance.
 - ☐ Bring minutes and governing documents.
 - ☐ Record motions and voting results during the meeting.
-

Treasurer

- ☐ Be prepared to present the financial report.
 - ☐ Bring financial records if questions arise.
-

Administrator/Meeting Coordinator (if applicable)

- ☐ Open the meeting room.
 - ☐ Test audiovisual equipment.
 - ☐ Test microphones.
 - ☐ Open the Zoom meeting, if applicable.
 - ☐ Distribute meeting materials.
-

After the Meeting

President

- ☐ Review action items.
 - ☐ Assign responsibilities and deadlines.
 - ☐ Thank volunteers, speakers, and committee chairs.
 - ☐ Begin planning the next meeting.
-

Secretary

- ☐ Prepare draft minutes.
 - ☐ Distribute minutes as required.
 - ☐ Update the action item log.
-

Treasurer

- ☐ Process any approved expenditures.
 - ☐ Update financial records.
 - ☐ Follow up on approved financial actions.
-

Committee Chairs

- ☐ Complete assigned action items.
 - ☐ Report progress to the President.
-

Administrator/Executive Director (if applicable)

- ☐ Archive meeting materials.
- ☐ Update the chapter calendar.
- ☐ Send follow-up communications, if requested.
- ☐ Update chapter records and website, if necessary.