EVENT PLANNING GUIDE

Rotary

Hosting or participating in an event is an excellent way to raise your club's profile, and Rotary's, in your community. Community events also offer an opportunity to raise awareness, establish relationships, inspire action, and highlight the progress Rotary has made in your area. It can start conversations among local leaders and influencers and get them involved in Rotary.

This guide, which includes ideas to get you started, a planning checklist, and a list of resources, will help you use events effectively.

1   DECIDE WHAT THE EVENT SHOULD ACCOMPLISH

Holding an event can be the perfect strategy for meeting club goals.

- Do you want to raise awareness of Rotary in your community?

- Does your club want to attract new members?

- Do you need to raise funds?

- Do you want to position your club's members as resources and experts in the community?

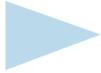## 2 CHOOSE THE TYPE OF EVENT THAT'S BEST FOR ACHIEVING YOUR GOALS

IDEAS FOR BUILDING AWARENESS OF ROTARY

▶ **Be an exhibitor at a local event:** Reserve a booth or table at a farmers' market, block party, convention, etc. Find volunteers to staff the booth and give out materials about Rotary.

▶ **Sponsor a major event in town:** Perhaps an annual parade in your community can become the Rotary Club of [Your Town] Parade. Or start an annual run/walk under your club's name.

▶ **Hold a one-day Rotary festival:** Feature local musicians and artists, food from local restaurants, and booths representing local businesses. Give the festival a name — Main Street Rotary Club of [Your Town] Fest, for example — and have club members there throughout the day to chat with attendees about what Rotary does and how your club works in the community. Collect email addresses and phone numbers of attendees to use for recruitment. If you can make the festival an annual event, it will become a reliable tool for generating interest and new members.

IDEAS FOR ATTRACTING MEMBERS

▶ **Hold a membership day:** Have each member invite someone who has shown an interest in Rotary. Make sure your program has both a social and an educational component. For example, schedule a meet-and-greet hour with refreshments, then have a notable speaker discuss a topic of interest to the community. Welcome your guests by introducing your club and several members. Follow up by telling guests the steps they can take to get involved or to join.

▶ **Give a presentation in the community:** Attend a meeting or event of another association or organization and give a presentation about Rotary and your club. Be sure to bring membership and club materials for attendees. Invite interested community members to your next meeting.

▶ **Co-host an event with another organization:** Cross-promotion is an effective way to increase membership. Work with another organization from your community to host an event that gives members of both groups a chance to network and learn how to get involved. As an incentive, offer a reduced first-year membership fee for the other organization's members if they join your club.

IDEAS FOR FUNDRAISING

▶ **Host an artisan market:** Invite local artists to sell their work, paying a fee for space, then donate the proceeds to The Rotary Foundation. Such a market can promote your club's community and international projects and encourage attendees to contribute to the Foundation themselves. Use your resources and connections to ensure that your event meets high standards. Invite local chefs, brewers, or bartenders to serve samples of their food and beverages to draw visitors.

▶ **Pair a fundraising event with a silent auction:** Sell tickets to a full-service event that includes food and beverages, dancing, and a compelling speaker with a connection to Rotary's causes. Proceeds can go to The Rotary Foundation or a club project. Adding a silent auction will boost your fundraising. Gather items of value from corporations and community partners, as well as offering professional services by club members.

▶ **Hold a thank-a-thon:** Gather club members for a session of writing thank-you notes to your club's donors from the past few years. (Donations are not limited to funds but can include space, supplies, food, etc.) In addition to expressing your appreciation, this gesture will keep your club in the minds of donors and partners and make it easier to solicit future donations.

IDEAS FOR ENGAGING THE COMMUNITY

▶ **Invite speakers to your club:** Host representatives of local companies, professionals, and community activists and leaders. Having them discuss their area of expertise with your members will raise your club's profile among other community influencers and could lead to long-term partnerships. Also, notable speakers might attract new members.

▶ **Plan a project related to one of Rotary's areas of focus:** For example, sponsor a food, clothing, or book drive; host a health and wellness fair; or fix up a community center or park. Service is at Rotary's core, so a service project highlights our values and the good work that we do.

▶ **Host a panel event:** Panel discussions can showcase Rotary as a key influencer. Invite leaders to participate in a discussion about locally important issues. Speakers could include representatives from local organizations, academic or professional experts, politicians and civic leaders, and Rotarians. Tips for success: Include an interactive segment, and invite people who have a connection to the topic to have a booth or table at the event so that community members can get more information and network with them.

3   ASSESS YOUR RESOURCES

Once you've chosen the type of event you want to host, assess the resources available to carry it out. Consider time, money, materials, and people. Here's an example of a timeline and checklist for planning an event that's open to the community.

TIME FRAME	TASKS
24-18 weeks before	☐ Identify the event's goals ☐ Create an event plan that covers topic, audience, speakers, sponsors, promotional plan, venue, risk management ☐ Build a team and assign roles ☐ Contract with the event venue ☐ Develop a budget ☐ Review possible contingencies (e.g., for outdoor events, develop a plan in case of inclement weather) ☐ Review insurance coverage for the event and contact your insurance provider ☐ Get tax and legal advice; hosting exhibits, sponsoring events, or accepting sponsorships may have tax and legal consequences for your club ☐ Develop a request for proposal to get vendor bids
18-12 weeks before	☐ Confirm speakers and rehearsal times ☐ Find sponsors ☐ Find exhibitors ☐ Get vendor bids (for meeting and event services, graphics, printing, audiovisuals, catering, music, photography, security, etc.) ☐ Analyze the bids and select service providers ☐ Negotiate contracts, including payment terms and service delivery ☐ Set deposit due dates ☐ Develop a registration system; include a question about dietary restrictions if applicable ☐ Obtain public performance licensing rights for music, etc. ☐ Confirm entertainment and any rehearsal or sound check times

TIME FRAME	TASKS

18-12 weeks before (continued)	☐ Confirm sponsors and exhibitors
	
	☐ Decide how and where you will promote your event
	
	☐ Inventory marketing materials: decide if any new ones are needed
	
	☐ Design promotional items:
	
	   - Event sign-up page
	
	   - Event posters
	
	   - Fliers
	
	   - Social media graphics
	
	   - Email campaign
	
	   - Videos
	
	   - Other advertising materials
	
	   - Materials for a Rotary booth at the event (banners, branded tablecloth, etc.)
	
	   - Signs for the event space (photos, backdrop, banners, etc.)

12-8 weeks before	☐ Send invitations ☐ Deliver invitations and promotional materials to speakers and partners to distribute to their networks ☐ Add information about the event on your club's website; explore other sites for promotion ☐ Deliver promotional materials to others in your network ☐ Draft a floor plan (include seating, registration area, attendee flow, exhibits, and food and beverage areas) ☐ Draft a detailed schedule for the event, including setup, rehearsals, breaks, and run of show ☐ Define volunteer assignments; note any special skills required

8-6 weeks before	☐ Send email reminder to event invite list; suggested topics:
	
	   - Registration reminder
	
	   - Latest program developments
	
	   - Logistic information
	
	   - Share with a friend
	
	☐ Start a phone campaign to key audience targets
	
	☐ Continue to distribute promotional materials
	
	☐ Recruit volunteers for specific assignments

TIME FRAME	TASKS
6-4 weeks before	☐ Send email reminder to event invite list; suggested topics: 　- Registration reminder 　- Latest program developments 　- Logistic information 　- Share with a friend ☐ Get speakers' presentations ☐ Develop the presentation on Rotary and your club ☐ Continue promoting the event ☐ Select menus, if applicable ☐ Train volunteers ☐ Refine the floor plan ☐ Refine the detailed schedule ☐ Make a delivery and storage plan for event materials (e.g., printed materials, sponsor items, badges, displays, etc.) ☐ Open event registration
2 weeks before	☐ Send email reminder to event invite list; suggested topics: 　- Registration reminder 　- Latest program developments 　- Logistic information 　- Share with a friend ☐ Finalize floor plan ☐ Finalize the detailed schedule ☐ Develop a detailed list of desired photos for the photographer ☐ Reconfirm all speakers, vendors, and logistics ☐ Give final floor plan and the detailed schedule to the event venue and key stakeholders

TIME FRAME	TASKS
1 week before	☐ Send email reminder to registered attendees ☐ Rehearse the program with speakers ☐ Determine last-minute vendor needs ☐ Prepare goody bags, handouts, etc. ☐ Contact media about the event ☐ Provide guarantees to the event venue ☐ Hold final meeting of planning committee with vendors to review all arrangements and timing
2 days before	☐ Send final email reminder to presenters and attendees ☐ Continue to follow up with media contacts ☐ Hold a final meeting with venue personnel to review the detailed schedule ☐ Deliver all materials to the venue
Event day	☐ Set up signs, tables, program materials, etc. ☐ Do a final review and walk-through of the event site ☐ Perform audiovisual checks ☐ Greet vendors and speakers ☐ Assign someone to greet media representatives and introduce them to speakers and partners ☐ Identify key people for photographer ☐ Collect contact information from walk-in attendees for follow-up

4   BUILD ON YOUR EVENT'S SUCCESS

To maximize your event's long-term impact and make it easier to hold future events:

Send thank-you notes: Be sure to thank speakers, event partners, attendees, and volunteers.

Stay connected: Following up to say thank you is also a great opportunity to solicit opinions on the event. And remember to send periodic updates to those who expressed interest in Rotary, your club, or a project.

Pursue event coverage: Media can't always attend an event, so send materials about it afterward. Include photos and videos that highlight noteworthy speakers and attendees who are of interest to that media outlet. Don't forget that social media can be effective in amplifying event coverage, so post highlights of the event and any media coverage it received.

Tell us how it went: Email a summary of your event to pr@rotary.org. You can also share your event's success by visiting www.rotary.org/rotarystory and posting images or video. Add #rotarystory to a Facebook, Instagram, or Twitter post about your event. Spreading the word about your event will inspire Rotarians in other communities. Together, we can raise awareness of Rotary.

5   EVENT RESOURCES

A range of handy event resources are available on the **Brand Center**, **Rotary Shop**, and **My Rotary**:

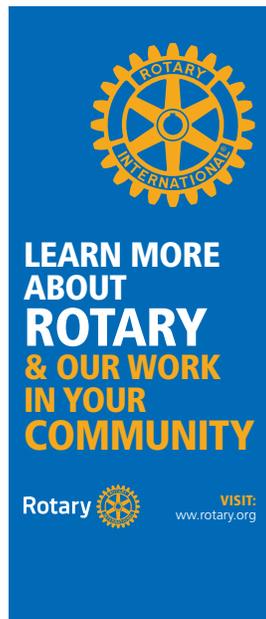### OFFICIAL LOGOS

Masterbrand Signature   Mark of Excellence

ROTARY AND AREAS OF FOCUS ROLL-UP BANNERS

LEARN MORE ABOUT **ROTARY** & OUR WORK IN YOUR COMMUNITY

VISIT: www.rotary.org

TRANSFORMING LOCAL ECONOMIES

SUPPORTING BASIC EDUCATION & LITERACY

ENHANCING MATERNAL & CHILD HEALTH

? If you need help getting started, or get stuck planning, we're here to assist. Email **pr@rotary.org**.

CLUB BROCHURE TEMPLATE

OTHER PROMOTIONAL RESOURCES:

➕ Prospective member brochure

➕ Discover Rotary presentation

ADDITIONAL RESOURCES ON THE BRAND CENTER:

➕ Newsletter, presentation, and letterhead templates

➕ Thank-you card

➕ Event promotion examples listed in the brand guidelines (posters, cards, digital assets)