



# EVENT PLANNING GUIDE

Rotary



[WWW.ROTARY.ORG/MYROTARY](http://WWW.ROTARY.ORG/MYROTARY)



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?



## 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.



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## 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	<ul style="list-style-type: none"><li><input type="checkbox"/> Identify the event's goals</li><li><input type="checkbox"/> Create an event plan that covers topic, audience, speakers, sponsors, promotional plan, venue, risk management</li><li><input type="checkbox"/> Build a team and assign roles</li><li><input type="checkbox"/> Contract with the event venue</li><li><input type="checkbox"/> Develop a budget</li><li><input type="checkbox"/> Review possible contingencies (e.g., for outdoor events, develop a plan in case of inclement weather)</li><li><input type="checkbox"/> Review insurance coverage for the event and contact your insurance provider</li><li><input type="checkbox"/> Get tax and legal advice; hosting exhibits, sponsoring events, or accepting sponsorships may have tax and legal consequences for your club</li><li><input type="checkbox"/> Develop a request for proposal to get vendor bids</li></ul>
18-12 weeks before	<ul style="list-style-type: none"><li><input type="checkbox"/> Confirm speakers and rehearsal times</li><li><input type="checkbox"/> Find sponsors</li><li><input type="checkbox"/> Find exhibitors</li><li><input type="checkbox"/> Get vendor bids (for meeting and event services, graphics, printing, audiovisuals, catering, music, photography, security, etc.)</li><li><input type="checkbox"/> Analyze the bids and select service providers</li><li><input type="checkbox"/> Negotiate contracts, including payment terms and service delivery</li><li><input type="checkbox"/> Set deposit due dates</li><li><input type="checkbox"/> Develop a registration system; include a question about dietary restrictions if applicable</li><li><input type="checkbox"/> Obtain public performance licensing rights for music, etc.</li><li><input type="checkbox"/> Confirm entertainment and any rehearsal or sound check times</li></ul>

TIME FRAME	TASKS
18-12 weeks before (continued)	<input type="checkbox"/> Confirm sponsors and exhibitors <input type="checkbox"/> Decide how and where you will promote your event <input type="checkbox"/> Inventory marketing materials: decide if any new ones are needed <input type="checkbox"/> Design promotional items: <ul style="list-style-type: none"> <li>- Event sign-up page</li> <li>- Event posters</li> <li>- Fliers</li> <li>- Social media graphics</li> <li>- Email campaign</li> <li>- Videos</li> <li>- Other advertising materials</li> <li>- Materials for a Rotary booth at the event (banners, branded tablecloth, etc.)</li> <li>- Signs for the event space (photos, backdrop, banners, etc.)</li> </ul>
12-8 weeks before	<input type="checkbox"/> Send invitations <input type="checkbox"/> Deliver invitations and promotional materials to speakers and partners to distribute to their networks <input type="checkbox"/> Add information about the event on your club's website; explore other sites for promotion <input type="checkbox"/> Deliver promotional materials to others in your network <input type="checkbox"/> Draft a floor plan (include seating, registration area, attendee flow, exhibits, and food and beverage areas) <input type="checkbox"/> Draft a detailed schedule for the event, including setup, rehearsals, breaks, and run of show <input type="checkbox"/> Define volunteer assignments; note any special skills required
8-6 weeks before	<input type="checkbox"/> Send email reminder to event invite list; suggested topics: <ul style="list-style-type: none"> <li>- Registration reminder</li> <li>- Latest program developments</li> <li>- Logistic information</li> <li>- Share with a friend</li> </ul> <input type="checkbox"/> Start a phone campaign to key audience targets <input type="checkbox"/> Continue to distribute promotional materials <input type="checkbox"/> Recruit volunteers for specific assignments

TIME FRAME	TASKS
6-4 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send email reminder to event invite list; suggested topics:           <ul style="list-style-type: none"> <li>- Registration reminder</li> <li>- Latest program developments</li> <li>- Logistic information</li> <li>- Share with a friend</li> </ul> </li> <li><input type="checkbox"/> Get speakers' presentations</li> <li><input type="checkbox"/> Develop the presentation on Rotary and your club</li> <li><input type="checkbox"/> Continue promoting the event</li> <li><input type="checkbox"/> Select menus, if applicable</li> <li><input type="checkbox"/> Train volunteers</li> <li><input type="checkbox"/> Refine the floor plan</li> <li><input type="checkbox"/> Refine the detailed schedule</li> <li><input type="checkbox"/> Make a delivery and storage plan for event materials (e.g., printed materials, sponsor items, badges, displays, etc.)</li> <li><input type="checkbox"/> Open event registration</li> </ul>
2 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send email reminder to event invite list; suggested topics:           <ul style="list-style-type: none"> <li>- Registration reminder</li> <li>- Latest program developments</li> <li>- Logistic information</li> <li>- Share with a friend</li> </ul> </li> <li><input type="checkbox"/> Finalize floor plan</li> <li><input type="checkbox"/> Finalize the detailed schedule</li> <li><input type="checkbox"/> Develop a detailed list of desired photos for the photographer</li> <li><input type="checkbox"/> Reconfirm all speakers, vendors, and logistics</li> <li><input type="checkbox"/> Give final floor plan and the detailed schedule to the event venue and key stakeholders</li> </ul>

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

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## 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](mailto:pr@rotary.org). You can also share your event's success by visiting [www.rotary.org/rotarystory](http://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

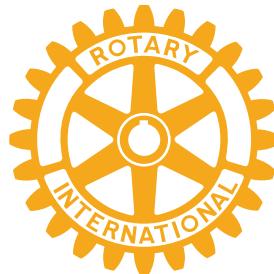
## EVENT RESOURCES

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

### OFFICIAL LOGOS



Masterbrand Signature

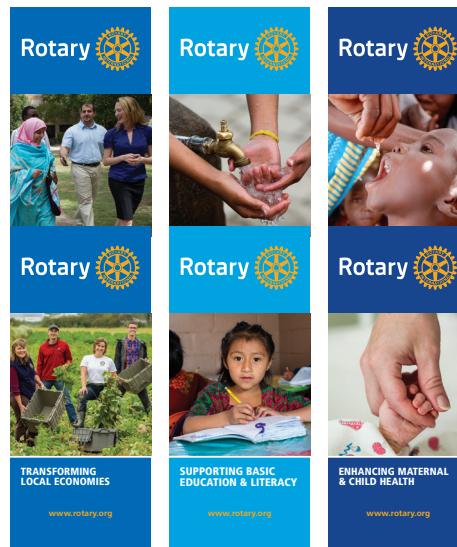
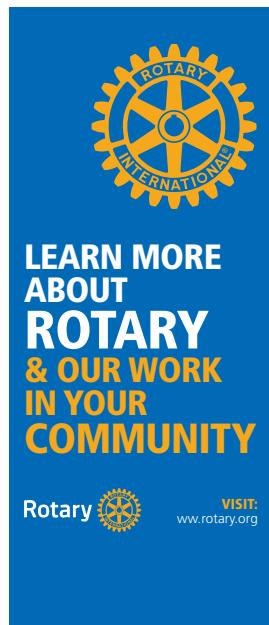


Mark of Excellence

### CLUB BROCHURE TEMPLATE



### ROTARY AND AREAS OF FOCUS ROLL-UP BANNERS



- If you need help getting started, or get stuck planning, we're here to assist. Email [pr@rotary.org](mailto:pr@rotary.org).

### 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)

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## APPENDIX A: USING VR AT A CLUB EVENT

Virtual reality, or VR, provides a 360-degree simulation of a world that may be different from your own. You can see how a person lives and experience their world for yourself without leaving home.

VR conveys the importance of our work in a way that words simply can't. This powerful experience may motivate Rotarians and friends of Rotary to join our effort and invest their time, money, and energy.

Rotary believes in the future of VR as a public awareness, membership, and philanthropy tool. We've produced a series of VR films, with more in production, that highlight our work as people of action.

This guide provides in-depth information about how you can incorporate VR into your next club event.

### EQUIPMENT NEEDS

You'll need three pieces of technology to experience VR:

#### 1. Smartphones with the Rotary VR app

**downloaded.** Rotary's VR films are available on the Rotary VR app. Download this free app from the Apple App Store or Google Play onto an iPhone or Android device.

#### 2. Noise-canceling headphones.

Hearing the film is just as important as viewing it. While basic earbuds can be used, noise-canceling headphones help diminish external sounds that can interfere with the viewing experience.

#### 3. VR viewing device.

Several types of VR viewing devices are available at a variety of prices. Rotary doesn't recommend a particular device, but we suggest you choose one that you're comfortable using and is within your budget. Visit your local electronics store to find one that's right for you.

Have at least two or three smartphones, phone chargers, noise canceling headphones, and VR viewing devices available at your event. This will allow multiple people to experience VR at the same time.

You'll also need antibacterial wipes or spray to clean the equipment after each use to minimize the spread of germs.





## ROOM SETUP

**Dedicate a small area to VR viewing.** This area should be semiprivate, where viewers can experience VR without feeling self-conscious.

**Place swivel chairs in your viewing area.** VR is a 360-degree immersive experience, so it's important that viewers can rotate their bodies freely and safely while sitting. Have as many swivel chairs available as you do VR viewing devices.

**Set up a check-in table.** Keep your event organized by having a central check-in location. Add a branded table skirt to make it easy for viewers to identify your club and the VR experience. Have a sign-up sheet and safety disclaimers available. Place the swivel chairs behind the check-in table to keep the area organized and avoid overcrowding. If you have the space, establish a waiting area so those viewing VR can do so without interruption.

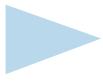


## PROMOTE YOUR EVENT

**Include the VR experience in your marketing messages.** Include this innovative, immersive viewing experience in all event promotions — on fliers, in direct-mail pieces, and on social media.

**Use branded banners.** Depending on the type of event you're having, place banners around the location to attract viewers. These banners can be branded with your club's information and the Rotary logo, or they can be specially made to promote the VR experience. You can also place the banners around your viewing area to draw guests' attention.

**Have club resources on hand.** Use VR to start a discussion with viewers on how they can participate in your club's activities. Have club resources available to guide viewers on getting involved.



## PRACTICE

Before your event, understand the technology and be comfortable using it. Learn how the VR Rotary app, the VR viewing device, and noise-canceling headphones work, individually and together.

**Host a training session.** Each volunteer should completely understand the technology, from how it works to what to do if problems arise. Create potential scenarios — the viewing device won't connect to the smartphone, there is no sound, the app won't load — and how to solve them. Provide the volunteers with talking points so everyone is communicating the same message.

**Create a pitch.** Before your event, determine your goal.

- Do you want the viewer to volunteer, donate, or get involved with your club?
- If you are raising public awareness, what do you want the public to know?

Based on your answers, prepare a 30-second pitch to deliver before and after a viewer watches the film. Start by telling them what they will watch and why it's important. Afterward, ask them about their experience. Discuss what they saw and how they can get involved. Remember to incorporate your goal.

Each event volunteer should practice this pitch so it's natural and authentic.



## PROJECT TIMELINE

As part of planning, assess the resources you have available to hold the event. Consider time, budget, materials, and staff to support the event properly. Below is a sample event timeline.

TIME FRAME	TASKS
<input type="checkbox"/> 18-12 weeks before	<ul style="list-style-type: none"><li><input type="checkbox"/> Create an event plan that includes the goal, audience, promotional plan, venue, and budget</li><li><input type="checkbox"/> Purchase VR technology</li><li><input type="checkbox"/> Book a location</li><li><input type="checkbox"/> Build the event team and assign roles</li><li><input type="checkbox"/> Solicit bids from vendors (graphics, printing, music, photography, etc.)</li><li><input type="checkbox"/> Create a distribution list for promotional materials</li><li><input type="checkbox"/> Take inventory of current marketing materials for reuse and determine new items that need to be created</li><li><input type="checkbox"/> Begin designing your promotional items<ul style="list-style-type: none"><li>- Event poster</li><li>- Flier</li><li>- Social media posts</li><li>- Email campaigns</li><li>- Pull-up banners and other signs for the event space</li><li>- Branded table skirt</li><li>- Any related materials</li></ul></li></ul>
<input type="checkbox"/> 12-8 weeks before	<ul style="list-style-type: none"><li><input type="checkbox"/> Begin promoting the event</li><li><input type="checkbox"/> Post your event listing on your club's website and social media pages</li></ul>
<input type="checkbox"/> 8-6 weeks before	<ul style="list-style-type: none"><li><input type="checkbox"/> Email a reminder to invitees</li><li><input type="checkbox"/> Start a phone campaign to key audience targets</li><li><input type="checkbox"/> Continue to distribute promotional materials</li></ul>

TIME FRAME	TASKS
<input type="checkbox"/> 6-4 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Email a reminder</li> <li><input type="checkbox"/> Develop your presentation and pitch for the event</li> <li><input type="checkbox"/> Continue promoting the event</li> <li><input type="checkbox"/> Plan a training session for volunteers to learn how to use the VR technology <ul style="list-style-type: none"> <li>- Draft talking points and scripts for volunteers, including a 30-second pitch</li> </ul> </li> </ul>
<input type="checkbox"/> 2 weeks before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Email a reminder</li> <li><input type="checkbox"/> Develop a behind-the-scenes schedule and a checklist of tasks for the event day</li> <li><input type="checkbox"/> Confirm all volunteers, vendors, and event logistics</li> </ul>
<input type="checkbox"/> 1 week before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Host training session for volunteers</li> </ul>
<input type="checkbox"/> 2 days before	<ul style="list-style-type: none"> <li><input type="checkbox"/> Send one last email reminder</li> </ul>
Event day	<ul style="list-style-type: none"> <li><input type="checkbox"/> Set up signs, a check-in table, swivel chairs, and related items</li> <li><input type="checkbox"/> Collect attendees' contact information for follow-ups</li> <li><input type="checkbox"/> Take photos during the event <ul style="list-style-type: none"> <li>- Have photo releases for viewers to sign so you can share event photos online or in club marketing materials</li> </ul> </li> </ul>
After the event	<ul style="list-style-type: none"> <li><input type="checkbox"/> Post event photos to social media and your club's website</li> <li><input type="checkbox"/> Follow up with attendees by phone or email to stay engaged with them</li> </ul>



## YOU'VE HELD A SUCCESSFUL EVENT

Congratulations! Your event was a success. To maximize the long-term impact and lay the foundation for future successful events:

**Keep in touch.** Follow up with those who viewed the film. Ask for their feedback. Stay engaged with them to cultivate long-term relationships as a donor, potential member, or volunteer.

**Share your success.** Post a recap of the event on your club's website. Talk about it with your neighbors. Share images on social media.

**Tell us how it went.** Include #RotaryVR on your social media posts. We can help share your event with the world and inspire others too.