Events

Events ⌄

Events offer an opportunity to take action, build relationships, and highlight the progress Rotary has made in your community and around the world. A successful event can inspire people to get involved in Rotary.

13 steps to planning a successful event

Hosting or participating in an event is a great way to raise awareness of Rotary in your community and expand Rotary's reach. Follow these steps to make sure your event is a success:

1. Organize a planning team
Hosting an event is a team effort. For smaller events, an event chair or planning committee may be enough. But for large events, you may want multiple chairs and committees to manage the venue and logistics, speakers and entertainment, budget, promotions and marketing, and volunteers. Consult with accounting, insurance, and legal professionals.

Have the planning committee give regular updates on its progress at club and board meetings to ensure that everything is going as planned.

2. Set the event's goals

Ask yourself why you're hosting this event and what you hope to achieve. Do you want to raise awareness, fundraise, support an area of focus, or attract a new audience? How does this event support Rotary's Action Plan? Set goals with measurable outcomes to track your success.

Find ideas for events.

3. Choose the event format

Will your event be in-person, virtual, or a mix of the two? Are you planning a keynote presentation, an online discussion, or a speaker panel? The format you choose depends on your event's goals, as well as your audience's preference.

4. Identify the audience

Who are you trying to reach and why? Ask these questions: What are your audience's interests, professions, and ages? Are they members of your community or your club? If minors will be involved in your event, make sure to follow **Rotary's youth protection guidelines**.

5. Establish the budget

Include the following in your budget:

- Venue or virtual hosting platform

- Food and beverages

- Speakers

- Entertainment

- Decorations

- Event staff

- Promotional materials, including signage and branding

- Equipment for presentations, including lighting and microphones

- Transportation, such as the cost of a bus or van rental

- Insurance, permits, licenses, legal costs, accounting costs, and taxes

6. Choose the event date

When selecting the date for your event, make sure to:

- Give yourself at least four months to plan

- Avoid holidays and competing events

- Confirm that your vendors, speakers, entertainment, and important guests are available on that date

7. Select your virtual platform or venue

Virtual considerations:

- **Platform.** If you plan to host a panel discussion, consider using Zoom. If you'd like audience participation throughout, consider using Facebook Live. If you need interpretation, make sure your platform will

accommodate it. Tell your audience if the event or session will be recorded, and get consent if you'll record or use anyone's image.

- **Length of sessions.** Remember to plan for breaks between sessions.

- **Opportunities for networking or breakout sessions.** Smaller groups help engage the audience and allow more opportunities for them to contribute.

- **Meeting management.** It can be difficult for a meeting's host or main speaker to engage with the audience while also managing meeting logistics. Consider appointing someone to monitor the chat or comments, mute and unmute participants, display the slides or documents, or move participants into and out of virtual breakout rooms.

Venue considerations:

- **Accessibility.** Is the venue conveniently located? Are entrances, restrooms, and elevators accessible to all participants?

- **Size and configuration.** Depending on the size of the audience and the purpose of the event, you may need separate rooms for registration, breakout sessions, support staff, or speaker waiting areas. You'll also need adequate space for any vendors.

- **Parking and transportation.** Is a parking lot or valet service available? If there is a fee for parking, will it be reasonable to your intended audience? Or is the venue easy to reach by public transportation?

- **Insurance.** Will you need to purchase separate insurance for the event?

- **Vendors.** Can you choose vendors based on your budget and preference, or does the venue require you to use its vendors?

- **Permits.** Will you or your vendors need to obtain permits? (Certain activities may require them.)

- **Audiovisual needs.** If your event will require speakers, microphones, or other equipment, be sure that you'll be able to set them up in your space. Find out if Wi-Fi and cellular service are available.

- **Budget.** What deposit is needed to reserve the venue? Will there be additional costs for security and staffing? What is the cancellation policy?

8. Negotiate and sign the contracts

Make sure to use written contracts with the venue, the virtual platform vendor, other vendors, speakers, entertainers, other software providers, and any exhibitors. The agreements should include indemnification, limitation of liability to your club for acts by the other party, and insurance terms. Use a model release or get written permission before recording any person's image or voice.

9. Choose speakers and entertainment

Determine your goals and budget for speakers and entertainment. Then hold a planning meeting with your team to identify potential speakers and entertainers who can help you achieve those goals. Keep in mind their relevance, influence, and cost, as well as your audience's interests. Use written contracts with the speakers and entertainers that include terms about permission to record and use their performances. Obtain all necessary licenses, including music licenses.

10. Develop an event theme

A theme will help shape the event's focus, marketing plan, and messaging. When choosing a theme, consider the event's purpose, goals, and audience.

Find **Rotary-branded virtual backgrounds** and **PowerPoint templates** to use at your event.

11. Create a promotion and marketing plan

Start by deciding which channels you'll use to promote your event. For example, if it's an event for club members, your website, newsletter, and emails may be enough. To publicize events for the public, you may want to use social media, post flyers in your community, or publish ads in the media.

Use your club, district, or zone logo on all the promotional materials. If the event has its own name or logo, you can use it alongside your club, district or zone logo by using a vertical line to separate the two.

Create your club, district, or zone logo.

Find templates for creating lockups.

Learn more about logos and lockups.

Next, set a timeline for your promotions. Develop messaging with your audience in mind: Focus on what's in it for them and why they should attend. You may want to target your messages to specific audiences based on their needs and interests. Use this messaging consistently throughout your marketing campaign.

12. Develop a media relations plan

Learn how to engage the local media to promote your event to a wider audience. Develop a public relations crisis management plan, and be prepared to respond immediately to any issues that could have a negative impact on your club or Rotary.

13. Create an event master plan

Your event master plan should give an overview of all aspects of the event, including:

- Venue, logistics, and catering management

- Speakers and presenters

- Activities and entertainment

- Marketing and promotions

- Registration information

- Sponsors and partners

- Volunteer and staff roles and responsibilities

- A detailed itinerary

- Emergency contact information and other aspects of your crisis management plan

- Legal risks and efforts to mitigate risk through contracts and insurance

Naming events

When you name an event or choose a URL for a website, if you want to use the word "Rotary," "Rotarian," "Rotaract," or "Interact," make sure you include the name of your club or district.

For example, call your event "Rotary Club of Evanston Bingo Night" instead of "Rotary Bingo Night." You might also call it "We Love Bingo!" without any reference to Rotary. By using your club logo or lockup in promotional materials, you make it clear that the event is affiliated with your club, not with Rotary International.

Learn more about logos and lockups.

If you use your club's name, your club must be in full control of the event. "Rotary" and "Rotary club" cannot be licensed to a third party to be used in the name of an event. These guidelines are in the **Rotary Code of Policies**.
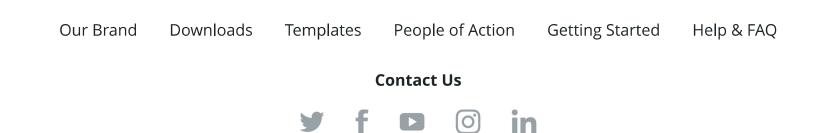
If you create a name and logo for the event, consult a local attorney about trademark and copyright clearance.

Build on your event's success

When the event is over, you can continue to use it to raise awareness of your club and strengthen your connection to the community. Here are some ideas for maximizing an event's long-term impact:

- **Send thank-you notes** to the event's speakers, partners, sponsors, attendees, and volunteers.

- **Invite attendees to connect with Rotary** on social media and send email updates to those who expressed interest in information about your club.

- **Send a post-event survey** to attendees to find out how to improve future events.

- **Pursue event coverage** by sending photos and videos to highlight noteworthy speakers and attendees to the media. Don't forget that social media can amplify your event coverage, so post photos of the event and any media coverage it receives. Be sure to get written consent before recording and using any person's image or voice.

Find out more about creating compelling photos and videos.

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