

PLANNING AND PROMOTING A SUCCESSFUL LIONS EVENT

Presented by Esther LaMothe, PCC
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Planning the Event

Step 1

Purpose

- Goals of the activity
- Assigned or voluntary
- Assessing the needs of the participants

Type of Activity

- Forum, Convention, Officer training, Leadership training, Fall/Spring Conference, Zone, Region, Cabinet meeting, Officer Installation, Charter Night, etc.

Committee/Individual Planning

- Decision Making – carte blanche, empowerments
- Appointed or selected by chairperson
- Committee Meeting
- Committee Assignments/deadlines/communication/frequency of meetings

Budget

- Preliminary
- Self-supporting/project funds/break even/historical perspective/outside funding.
- Develop a checklist with deadlines

Step 2

Date

- Calendars-coordinate calendars/timely date
- Check constitution and by-laws, policy manuals, etc
- Seasons
- One day, one evening, overnight
- Travel
- Number of participants
- Guests
- Goal of the Activity-keep the goal in mind

Location

- Bids
- Availability
- Number facility can hold
- Breakout rooms, meeting rooms, auditorium-costs
- Parking
- Special Needs Accessibility
- Business Center – costs
- Prices
 - Meeting room(s)
 - Lodging – rates, minimum # of rooms
 - AV Equipment
 - Availability
 - Costs
 - Bring in own equipment
 - Linens, table service, centerpieces
 - Meals, refreshments
 - Staff
- Cleanliness/up-to-date facilities/safety
- Make an on-site visit before you sign anything!

Contract

- Drop dead signing date
- Minimum requirements
- Deposit
- Tax exempt

Freebies

Food Service

- Theirs, yours – caterer
- Hidden costs – tax, tip, other
- Special dietary needs
- Compensatory meals
- Contact person
- Costs
- Quantity

Janitorial

Flag

Podium/microphone

Tables

Time – actual meal time

insurance

One person in charge of the site

Step 3

Program

- Speakers, general session, breakouts
- Schedule
- How many participants
- Assign topics
- Selection of speakers

Speakers/Presenters

- Initial contact
- Written confirmation
- Personal confirmation
- Outline expectations
- Develop evaluation tool/share with presenters/evaluation forms
- Stipend/gift/mileage/room/meals/significant other
- Emcee
- Biography
- Materials – publication deadline
- AV Equipment

Step 4

Budget

- 10% attrition rate
- Food
- Facility charges
- Promotion
 - Stationery/printing
 - Postage
 - Advertising
 - Phone Calls
 - Typist fee
 - Personal transportation
 - Special needs/meetings

Materials

- Workshop supplies
 - Lion paraphernalia, extension cords, handouts, material preparation fees,
 - Tape, cassettes/videos/DVDs, posters, name tags, table name cards,
 - Decorations, post-workshop
 - Mailings, certificates, awards, plaques, etc.

Everything, including the kitchen sink!

Promoting the Event

Step 5

Promotion

- Publish the date early/keep date in the forefront
- Mailings/publications/personal appearances/word of mouth
- Registration deadlines/nonrefundable disclaimer
- Follow-up phone calls
- District Officers/Committee members

Step 6

Final Preparation

- Contact each speaker/presenter to confirm the date, time, location, etc.
 - Answer questions/concerns/share the number of registrants, etc.
- Contact the location to confirm all preparations
- Contact food service with numbers and confirm costs, etc.

Have Plan B ready in case something goes wrong, because it probably will!

Hosting the Event

Step 7

- Arrive early
- Troubleshoot meeting rooms
 - Test equipment, check table arrangements, room set-up, temperatures, etc.
 - Head table, protocol
- Check in with location contact person
- Greet the presenters and show them their rooms. Make them feel welcome
- Be in charge – do not accept secondary obligations, too. Your job is to make sure everything
 - Runs smoothly.
- Have host for special guests
- Have an official greeter(s)
- Registration table/cash box
- Gifts in place
- Checks written or treasurer with checkbook
- Cell phones
- Talk with participants as the evening progresses and at the end.
- SMILE!
- Last to leave

Be Prepared-something may go wrong!

Following-Up

Celebrate your Success!

Step 8

- Write thank yous to each presenter, speaker, location, committee member, etc.
- Tabulate evaluations and share the results with the speakers
- Convene the committee and review the event.

Begin planning the next event!

1957

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Planning Checklist

Presenter Esther LaMothe, PCC

Use this checklist as a guideline for promoting and planning your event. You may add or delete items as appropriate for your event.

At Least Three Months Prior

- Determine the goals of the event
 - Identify audience
 - Set up an organization committee
 - Set a date
 - Secure a location/confirm in writing
 - Determine format
 - Invite speakers/confirm in writing
 - Draft a budget
 - Create a communications plan
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Two Months Prior

- Create Registration form/have printed
 - Create publicity materials (flyers, posters, ads, etc.)/have printed
 - Create mailing list for invitations
 - Publish date in District/club publications; Post on website
 - Create a media list for publicity
 - Secure food and beverage service
 - Secure audio-visual equipment
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Six Weeks Prior

- Mail invitations
 - Post flyers, posters, etc.
 - Begin creating program brochure
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One Month Prior

- Personally follow up invitations
 - Purchase necessary supplies –easel pads, markers, pens, notepads, nametags, etc.
 - Order tables, chairs, tablecloths, etc.
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Three Weeks Prior

- Follow up with speakers to confirm arrangements, answer questions, etc.
 - Create sign in/registration sheets
 - Finalize program for printing
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Two Weeks Prior

- Reconfirm all logistical arrangements
- Meet with moderator or emcee to review schedule for the event, discuss objectives, answer questions, etc.
- Create a schedule/responsibility outline for the event day
- Send program to printer

One Week Prior

- Hold a strategy meeting with your committee and other event volunteers to review responsibilities and schedule for the event
- Make follow up calls to media regarding event attendance—confirm time, location, notable speakers, etc.
- Gather all materials you need to take to event

Day of Event

- Arrive early for set-up and last minute troubleshooting
- Evaluate event
- Hold a successful event!

After the Event

- Write/send thank-you notes to speakers and your committee members
- Review evaluations
- Submit a report to your Club President, District Governor, or person of higher authority
- Begin planning the next event

This event-planning checklist is an adaptation of Lions Clubs International Publication, MP-101: *Lions Worldwide Women's Symposium Planning Guide* Planning Checklist.