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!

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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

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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

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Day of Event

___Arrive early for set-up and last minute troubleshooting
___Evaluate event
___Hold a successful event!

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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

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