**Four to Six Months Out**

* **Set Goals and Objectives** - Set the specific goals and objectives for your MEMBERSHIP SUMMIT event. How will you communicate ways to improve membership development and growth?
* **Delegate** – Utilize the District Membership TEAM to develop a clear outline of goals, objectives and your budget, and work with them do the planning.
* **Target Your Audience** - Determine who you are inviting and think about who your target audience should be. Promote the event to ALL members in the District.
* **Estimate Attendance** - Estimate how many people you think will come based on your target audience. This will determine ticket pricing and the size of the venue you need to locate.
* **Set a Budget** - Outline a realistic budget and work within those parameters. If it is a first-time event, then you will have to do some educated guessing. Talk to other districts that have held similar events and see if they have any suggestions on budgeting. Consider the costs of venue, food, presenter fees, travel, & accommodations, and such.
* **Set Cost Per Ticket** - Determine if this is to be a break-even event or supplemented by the district, if applicable.
* **Find and Book a Venue** - After deciding the size and scope of the event, find a venue that is within your budget and helps create the atmosphere you want for the Membership Summit. Book it well in advance, and pay any required deposits.
* **Communicate Details** - Alert all the appropriate district leadership about the Membership Summit date, time and location.
* **Select a Theme** - If applicable, determine the theme for your Membership Summit. Develop a graphic for your event to promote it using Rotary’s logo and RI President’s Theme.
* **Schedule “SAVE THE DATE” Promotion** – At Pre-PETS, PETS, District Training Assembly.
* **Confirm Speaker/Speakers Selection** - Confirm with the speaker or speakers the expectations for travel, meal and lodging cost to cover. Utilize Zone RC TEAM where possible.

**Two to Three Months Out – (MINIMUM)**

* **Create Back-up Plans** - ***Always*** have **Back-up** **Plans** in place for any unexpected challenges, like COVID.
* **Plan the Menu** - Finalize your menu with the caterer or facility. Keep the meal simple and easy to get by the attendees. Recommend pre-made wraps or sandwich with fruit or pasta or chips & cookie (Box Lunch) with water, sodas, juice, or such. Plan for some Vegetarian or Gluten Free requests. (*Include a spot in the Registration for this request*)
* **Target Your Promotion** - Three months out is the minimum time to start promoting the event to make sure it gets on people’s calendars. You can share information using DACdb P-Mail, the District Newsletter, and the District Website. Focus your promotion toward your target audience. Remember: No matter your audience, you have to convince people that the event is worth their time and money.
* **Set Up Online Registration** - Create an Online Registration using DACdb calendar to track your Registration and payments all in one system. ***Simplify to reduce logistics***.
* **Send “REGISTER NOW!” Email –** to target audience (Start at 3 months every other week, at 2 months each week)
* **Confirm Printed Materials Needed** - Confirm with the Planning TEAM the printed materials needed and confirm with printer dates needed to have ready for the event.
* **Confirm with Speaker(s)** - Confirm with the speaker or speakers the expectations for the event. Confirm all accommodations for speakers.
* **Schedule Volunteers** – Membership Planning TEAM & AG’s to help, both before and the day of the event. Provide them with name tags and food the day of the event. Also select Break-Down Team for the event.
* **Contact Clubs Not Registered with Personal Phone call -** Membership TEAM & AG’s to contact by personal phone call the club leaders not registered. (Start 4-6 weeks out)

**One Month Out**

* **Reminder Email “You are Not Registered Yet!” –** (Weeks 4 & 3) Use Reconcile in DACdb Registration to mail only those not registered or regretted.
* **Contact Clubs Not Registered with Personal Phone call -** Membership TEAM & AG’s to contact by personal phone call the club leaders not registered. Second round of phone calls. (Weeks 3 & 4)
* **Confirm Agenda** - Finalize the agenda/timeline with all presenters. Make sure all presenters & attendees know the schedule and expectations. Provide them with a point of contact if they have questions.
* **Confirm Speaker(s)** - Confirm with the speaker or speakers the expectations for the event.

**Two Weeks Out**

* **Confirm Registration Numbers** - Double-check attendance numbers with the venue and caterer to make sure you have enough tables, chairs and food. Expect that some people won’t show up and some will come without Registering. It usually evens out but is always wise to have extra chairs and a few extra place settings.
* **Confirm Speaker Details** - Double-check with speakers for travel plans and have all contact mobile numbers and email addresses.
* **Finalize Plans and Communications** - Meet with your planning team leaders to revisit each area of the event timeline. This is a good opportunity to fill in gaps and make sure everyone is on the same page. Be sure to develop necessary backup plans.
* **Print Guest List and Name Tags** - Confirm and print the guest list and name tags. Have blank name tags available for last-minute guests or missing name tags.
* **Finalize Seating Plan** - If you have assigned seating, confirm table arrangement and seating chart.
* **Plan Clean-Up** - Make a cleanup plan and communicate it to your team so they know what to do once the event is over. Clarify what the venue will do and what your team is responsible to complete.

**The Week Before**

* **Secure all On-Screen material** – Review, inspect and correct typos, font sizes/colors for readability, logos, etc. Make sure all material is the right format and file type for the production equipment you plan to use.

**The Day Before**

* **Set Up** - If possible, set up the venue the day before (or early in the morning on the day of the event). Make sure all signs are up, tables are in place and the registration area includes name tags, registration list, pens, and paper.
* **Do a Practice Run** - If this is a large or complicated event, consider doing a practice run to make sure you know where everything will be set up and which people need to be where and when.
* **Confirm All Details** - The day before is almost as important as the day of the event. Confirm all the major and minor details that are important to the event schedule and guest speaker/speakers travel. Have complete list of all presenters and their contact mobile numbers & email

**Event Day**

* **Set Out Parking & Direction Signs** - As needed, put up parking signs that direct guests where to park. Also put out signage for directions to the room or rooms for the event or have volunteer’s direct attendees to those locations.
* **Complete a Volunteer Check** - Check in with volunteers to make sure they have everything they need.
* **Finish Set Up** – Arrive early to confirm set up & room arrangement if you weren’t able to the day before.
* **Communicate** - Make sure all staff, volunteers have copies of the schedule, instructions and contact phone numbers if they need to reach someone.
* **Give a Warm Welcome** - No matter what is going on behind the scenes, greet guests with a smile and let them know you are glad they have come.
* **Settle Up** - Pay venue and caterer as agreed and make sure to thank them.