

Introduction

Training represents an opportunity for Rotarians to grow their knowledge base, engage fellow Rotarians, and improve their skills to become more effective in their clubs, the district, and in their workplace. This **Planning Guide** has been developed to assist district leaders and committees in scheduling, developing, and delivering effective training and professional development sessions for Rotarians in RID 6270.

Step 1: Reserve Your Date

Request your training date via the form on the district website. Dates should be requested a minimum of two months in advance.

<https://rotary6270.org/SitePage/meeting-event-request>

Once approved, the event will be added to the district calendar and a Zoom registration link (if virtual or hybrid) will be created and sent to the coordinator.

The information you will need to complete the form includes:

Date/Time of event:

Event Title:

Point of Contact/Coordinator (name, email, phone number):

Delivery Mode: (in person, Zoom, hybrid)

If Zoom or Hybrid, name of the Host/Zoom Operator:

Physical Location: (if in person or hybrid)

Step 2: Determine Your Content Plan

Purpose of Event: (What are your desired outcomes? This answers the question “After this session, participants will be able to...” Note, consider limiting to three outcomes if session is 45 to 60 minutes, and five outcomes if 90 minutes or longer):

Format: (guest speaker, interview, panel, roundtable discussion, etc)

Identify Engagement Tools: (breakouts, chat, Menti, etc)

Assign Session Roles using the definitions below:

Host/Zoom Operator:

Moderator (Zoom Co-Host):

Presenter/Facilitator (Zoom Co-Host):

Scribe (optional - see definition):

Definitions

Host/Zoom Operator - responsible for managing the technical aspects of the session. The key areas are managing attendees, screen sharing, and recording the session.

Moderator (Zoom Co-Host) - responsible for welcoming participants to the session, communicating the room norms, and introducing the presenter. The Moderator will monitor chat and manage comments/Q&A.

Presenter/Facilitator (Zoom Co-Host) - the subject matter expert that will be the primary content presenter for the session.

Scribe - If the purpose of the session is to capture and document decisions, a scribe may be appointed for the purpose of note-taking. The scribe may also assist the Moderator to monitor chat and manage comments/Q&A.

Step 3: Establish Your Planning Timeline

Download and save the Planning Timeline Calculator here: [📄 Planning Timeline Calculator](#)

Then, enter your training date, and the following milestone dates/deadlines will calculate for you!

2 months prior: Submit event request for approval/addition to district calendar. The Zoom event will be created and a host key provided by [Dana Kohlmeyer](#). It is the session developer's responsibility to oversee draft content plans and assign roles.

6 weeks prior: Determine the target audience. (Who do you want to attend? How do you identify prospective attendees, and communicate with them?) Develop a promotional plan, including the tools and message, an introductory PPT slide for club meetings, email, newsletter blurbs, etc.

3 to 4 weeks prior: Finalize your content and draft the day-of event timeline. Send a "save the date" email in coordination with [Dana Kohlmeyer](#). The intent of the "save the date" email is to

provide title, date/time, location, 1-2 sentence description, and registration link(s) - Zoom link if virtual or hybrid, ClubRunner (or similar) if hybrid or in-person.

7 to 10 days prior: Send an invitation email in coordination with [Dana Kohlmeyer](#). Contact [Lisa O'Halloran](#) if you would like a post-event survey prepared. Confirm that all hosts, moderators and presenters are registered and have Zoom access. Schedule and conduct a rehearsal. We advise that the hosts, moderators, and presenters use the hardware and location they intend to use on the day of the event to identify and resolve any technical issues that may arise prior to the event.

3-4 days prior: Send a "last chance" email - again, in coordination with Dana. Lisa O'Halloran will provide you with a survey link if you requested one.

2 days prior: Conduct your final rehearsal.

day of: If your event is virtual or hybrid, Dana will provide an updated participant list and the Zoom Host Key to the coordinator, and send Zoom session reminder emails to all registered participants. The event coordinator will touch base with hosts, moderators, and presenters for any last-minute questions.

post event: If your event is virtual or hybrid, Dana will send an attendee list to the coordinator. The coordinator will send a follow up thank you with any promised materials (slides, handouts) and survey links if requested.

Step 4: Develop Your Session Content

Who is the target audience for this session? What do they already know about the topic? What are your desired learning outcomes? How many attendees do you expect?

Considerations:

Who is the subject matter expert?

Will you use PowerPoint slides or other visual aids? Video clips? Websites?

How will you engage and interact with the audience?

Download and save the Meeting Template here: [Meeting \(day of\) Template](#). This template will assist in developing the session, rehearsing the session, and in keeping the session on track the day of. To use this template, enter the start time of your event in cell A2. Then, add activities (row D) and estimated time for each (row C) and the times will auto-calculate for you.

Step 5: Promote Your Event

Consider your audience, how to best reach it, and with what frequency to do so. Coordinate with Dana Kohlmeyer, as needed, to execute your plan.

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Options could include:

Broadcast or targeted email via ClubRunner
Club President Town Hall announcements
DG Monthly Newsletter
PowerPoint slide for Presidents' to share at club meetings
Blurbs for club newsletters
Social media

Step 6: Conduct Rehearsals

Conduct at least two rehearsals, using the equipment and digital collateral that you will use in the actual event. Use the day-of timeline that you downloaded from above to ensure the presenting team is ready, technology and tools work as planned, and that the 'day of' timeline is accurate. Update as needed.

Step 7: Conduct the Event!

Engage your audience and have fun! Complete the post-event items as noted in the timeline.

Note: This document, the event request form, and the documents linked in steps 3 and 4, all reside on the District website: <https://rotary6270.org/SitePage/meeting-event-request>