

Training Seminar	Rotary Year

12 to 6 MONTHS before MEETING	Date:	
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Select the date(s) and venue with the convener.		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

6 MONTHS before MEETING	Date:	
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Start to determine your training needs. Begin planning a needs assessment.		
<input type="checkbox"/> Distribute the Needs Assessment Questionnaire (available at www.rotary.org) to past and potential participants.		
<input type="checkbox"/> Look at past evaluations, or gather comments about past training meetings from past participants by phone or in person.		
<input type="checkbox"/> Think about the training agenda. Which session topics are crucial? Which topics should be added or combined?		
<input type="checkbox"/> Begin to consider qualified trainers.		
<input type="checkbox"/> Review past budgets for similar seminars. What is the anticipated income and expense of the meeting?		

<input type="checkbox"/> Analyze Needs Assessment Questionnaire and interviews.		
<input type="checkbox"/> Prepare a promotional schedule.		
<input type="checkbox"/> Highlight the meeting in monthly newsletters, district websites, or mass mailings.		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

3 MONTHS before MEETING		Date:
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Finalize meeting agenda.		
<input type="checkbox"/> Decide room setups for each session, depending on agenda (refer to Planning a Training Meeting at www.rotary.org).		
<input type="checkbox"/> Finalize budget (refer to Budget Worksheet at www.rotary.org).		
<input type="checkbox"/> Secure appropriate meeting space based on training method to be used.		
<input type="checkbox"/> Provide the venue with details on session setup (date, room name, start and end times) and any services you will need the venue to provide (room setup, equipment, computers, banqueting, decorations, signs). Ensure that janitorial services will be provided before and after each session.		
<input type="checkbox"/> Arrange banqueting service.		
<input type="checkbox"/> Select training leaders. Once they accept, give each trainer the Training Leader Preparation Worksheet at www.rotary.org .		
<input type="checkbox"/> Prepare training leaders (refer to the Train the Trainer Session Guide in this manual or at www.rotary.org).		
<input type="checkbox"/>		

<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

5 WEEKS before MEETING		Date:
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Decide what printed materials will be needed for the meeting (i.e., letterhead, envelopes, name badges, tent cards, program booklets, registration forms, meal tickets, handouts, publicity material, evaluations, signs), and plan how and when to distribute them.		
<input type="checkbox"/> Appoint an editor in chief to review these materials before printing.		
<input type="checkbox"/> Organize the production of meeting materials.		
<input type="checkbox"/> Organize onsite materials (notepads, pens, flip charts, markers, erasers).		
<input type="checkbox"/> Make arrangements for equipment (microphones, speakers, LCD projectors, screens, computers, television/DVD, podiums, water service, etc.) with contracted venue or appropriate vendors.		
<input type="checkbox"/> Contact clubs that haven't registered.		
<input type="checkbox"/> Arrange for interpreters, if needed.		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

2 WEEKS before MEETING		Date:
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Finalize participant list.		
<input type="checkbox"/> Print tent cards and name badges.		
<input type="checkbox"/> Send an e-mail reminder to all participants.		
<input type="checkbox"/> Ensure the registration packets include necessary tickets and handout materials.		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

1 DAY before MEETING		Date:
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Check the meeting venue. Arrange seats for distinguished guests and Rotary officials, according to RI protocol as stated in the Rotary Code of Policies.*		
<input type="checkbox"/> Meet with training leaders to discuss last-minute questions. Provide training leaders with a training room checklist located on the Training Leader Preparation Worksheet at www.rotary.org .		
<input type="checkbox"/> Save files needed for training to laptop, CD-ROM, or USB drive.		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

* Rotary Code of Policies 26.090 addresses the order of protocol to be used to introduce, present, and seat all current, past, and future officers of RI and its Foundation, committee members, and their spouses at all RI meetings and functions.

DURING MEETING	Date:	
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Check the meeting venue.		
<input type="checkbox"/> Talk to participants to make sure everything is going well.		
<input type="checkbox"/> Use a minute-by-minute checklist/agenda to manage meeting.		
<input type="checkbox"/> Distribute evaluation forms.		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Up to 2 WEEKS after MEETING	Date:	
Action	Assigned to	Target Completion Date
<input type="checkbox"/> Debrief with committee members, and discuss meeting outcome.		
<input type="checkbox"/> Debrief with all training leaders.		
<input type="checkbox"/> Review evaluations and analyze results.		
<input type="checkbox"/> Share ideas for improvement with district leaders.		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		