

Zone 33 Rotary Leadership Institute



Site Protocol

Rev 1/1/2009

bww

Basic Division of Responsibilities

- The *Facilities Coordinator* (“FC”) is the Rotarian, usually resident in the Rotary District where the event is being held, in charge of site operations, which include planning and implementing appropriate (1) breakout and plenary facilities for RLI session requirements, (2) food & beverage requirements, (3) Sergeant at Arms and on-site registration and welcoming presence, (4) promotion, and (5) setup and breakdown of event.
- The *Program Coordinator* (“PC”) is the Rotarian in charge of planning and implementing appropriate (1) faculty solicitation, (2) course scheduling and assignment, (3) course materials, and (4) reserve or backup faculty.
- The *Registrar* is the Rotarian in charge of collecting and tabulating registrations for the event and communicating registration information to the Facilities Coordinator and Program Coordinator for event attendance adjustments. The Registrar is currently centrally based for all Zone 33 RLIs. The Registrar is PDG Jack Porter who can be contacted at porterjack@prodigy.net.
- The *RLI District Chair* is the Rotarian, appointed by the District’s Governor, who is the official representative of RLI in a district and is the voting member at official Zone 33 RLI functions. The RLI District Chair may appoint the Facility Chair and other members of the District RLI Committee.
- The *State Coordinator* is the Rotarian member of the Zone 33 RLI Executive Committee overseeing a particular RLI event.

Facilities Policies

1) Financial

- a) Budgeting for the event
 - i) Primary responsibility of FC
 - ii) \$50.00 per person maximum budget for all facilities costs
 - iii) Written facilities budget to be submitted to State Coordinator (for example see Exhibit “A”)
 - iv) Budget shall include a good faith estimate of attendees, which may be periodically revised. Final budget revisions should be made as soon as possible after the two week registration deadline.

- b) Accounting & Registration
 - i) Pre-registrations are to be submitted to RLI Registrar via www.rli33.org and are handled centrally
 - ii) Attendance list of pre-registered attendees to be provided to FC by Registrar
 - iii) Registration table
 - (1) Table should be manned 30 minutes before registration begins
 - (2) Distribute name badges- provided by Registrar to PC
 - (3) Registration table staff to check off actual attendees and add any additional attendees to master registration list
 - (4) Reserve name badges and markers for errors and late registrants
 - (5) Hand out student materials – provided by PC
 - iv) On-site registrations
 - (1) Discretionary with FC & PC, space, faculty, materials and meals permitting
 - (2) If allowed, FC responsible for collection and accounting for funds
 - v) Master registration list to be delivered to PC and Registrar after close of registration table
- c) Legal contract
 - i) DC-FC is responsible for negotiating the legal contract with any required entity for the provision of any of the session requirements
 - ii) Contracts are to be made in the name of “Zone 33 Rotary Leadership Institute” and signed by a State Coordinator or Board Member of RLI, preferably the State Coordinator for the state in which the event is held
 - iii) Contract Deposits
 - (1) No deposit preferable
 - (2) Deposit funds, if required, can be requested from RLI Treasurer, who will advance a reasonable sum
 - iv) Contact person on contract should be the FC

2) RLI facilities requirements

- a) General Facilities Needs
 - i) professional and dignified venue
 - (1) convention center, hotel, business educational center
 - (2) educational institution, college, university, community college
 - ii) location considerations
 - (1) central location for anticipated attendees
 - (2) consideration of other district attendees
 - (3) adequate and convenient parking
- b) Breakout facilities
 - i) Room dimensions: minimum size: 400 square feet, ex. 20’x 20’ room
 - ii) Room Arrangements
 - (1) 6’ or 8’ foot long tables

- (2) U-shaped table arrangements
 - (3) Seating for 15 students outside the “U”
 - (4) Small table at front of “U” for materials & A/V equipment
 - (5) Instructors chair
 - iii) Adequate lighting and dimming for use of overheads
 - iv) Room should be set up prior to opening registration for event
 - v) Proximity of restroom facilities
 - vi) Proximity of refreshments and break area
 - vii) Rooms should be checked in advance by faculty assigned to room
- c) Plenary (Massed) facilities
- (a) Bell & gavel
 - (b) Flags
 - (c) Appropriate amplification, if needed
 - (2) Room setup
 - (a) Dependent on whether part of meal based meeting
 - (b) Tables/chairs v classroom seating
 - (c) Rotary banners or other Rotary signs
 - (i) “Welcome Rotarians” or similar banners from Rotary District
 - (ii) “Rotary Leadership Institute” banner from RLI
 - ii) Breakfast/Luncheon
 - (1) Speakers podium
 - (2) Meal setup as negotiated- for timing considerations, buffet or timed meal service
 - (3) No speaker is preferred
 - (4) 6-8 persons per table
- d) Faculty meeting area
- i) For pre-event meeting of faculty and notes
 - ii) Storage/ distribution of necessary faculty materials
 - iii) Table for faculty refreshments
 - iv) Adequate chairs
 - v) Room security for faculty personal items
- 3) Food & beverage requirements
- a) Meals
 - i) Meals should not be so heavy as to encourage sleepy behavior, especially after lunch
 - ii) Food choices
 - iii) Alternate entrée issues: health, religious options
 - b) Breaks & snack

- i) Beverages, incl. Water, sodas of Pepsi & Coca-Cola brands, diet and regular, juices
 - ii) Snacks, cookies, fruit, power bars or other “energy food”
 - c) Faculty refreshments
 - i) Same as participant
 - ii) Early coffee and snacks appropriate where faculty is assisting with set up or registration. Coffee should be available no later than 8:00am
- 4) Audio-visual requirements
 - a) FC and PC to coordinate A/V needs
 - b) No overhead projectors or Power Point projectors are used
 - c) Computer(s) and wireless or wired internet should be available at registration desk to aid with next event sign ups.
 - d) FC and PC to coordinate flip charts and other needs. Flipcharts, markers, and other manipulatives may be provided by individual faculty or PC.
- 5) Promotional requirements
 - a) FC & PC responsible for coordinating promotional plan with Host District & RLI Promotions Coordinator. District Governor, DGE, DGN & District Trainer should be invited to attend as an observer.
 - b) RLI informational brochures may be provided by RLI or run off by District
 - c) RLI Webpage provided by RLI at www.rli33.org
 - d) District to determine best method of reaching eligible Rotarians
 - i) Mass mailing
 - ii) Post on District website
 - iii) Articles in District Newsletter
 - iv) Email blast to District Rotarians
 - v) Highlight in Governor’s address to clubs
 - vi) Announce at District Events
 - vii) Integrate with District Training Schedule
- 6) Sergeant at Arms
 - a) FC responsible for manpower
 - b) To direct participants to session locations
 - c) General troubleshooting
- 7) Signage
 - a) Adequate signage from entry of facility to initial meeting area; arrow signage, see Exhibit “B”. The location and date should be customized on each sign
 - b) Signage on each breakout room, plenary room, meal room and other areas to be used
 - c) Signs should be marked “Rotary Leadership Institute” with RLI logo & room or group number – See Exhibit “B” for example
- 8) Setup and breakdown of event

- a) FC responsible for manpower for setup & breakdown of event
- b) May be part of negotiated package with facility

Exhibit "A"

**Zone 33 Rotary Leadership Institute
Facilities Budget**



Receipts: _____ registrants @ \$50.00 per person = \$ _____

Expenses:

- Negotiated Facility Fee: \$ _____
- Negotiated meals
 - Number of meals: _____
 - Per meal cost: \$ _____
 - Guaranteed minimum meals _____
 - Subtotal negotiated meals \$ _____
- Negotiated other food/drink for breaks
 - Number of attendees: _____
 - Per person cost: \$ _____
 - Guaranteed minimum meals _____
 - Subtotal food/drink for breaks \$ _____
- Audio-Visual Fees
 - _____ \$ _____
- Promotional costs: itemize: (Host district should bear this expense)
 - _____ @ \$ _____
 - _____ @ \$ _____
 - _____ @ \$ _____
 - Subtotal promotional costs \$ _____
- Other costs: itemize:
 - _____ @ \$ _____
 - _____ @ \$ _____
 - _____ @ \$ _____
 - Subtotal other costs \$ _____

Total Expenses: \$ _____

Total Surplus/Deficit: \$ _____

Exhibit "B"

Breakout Room

“A”



Facility Name
City, State
Month, Day, Year

Exhibit “B”

Breakout Room “B”



Facility Name
City, State
Month, Day, Year

Exhibit "B"

Breakout Room "C"



Facility Name
City, State
Month, Day, Year

Exhibit “B”

Breakout Room “D”



Facility Name
City, State
Month, Day, Year

Exhibit "B"

Registration



Facility Name
City, State
Month, Day, Year

Exhibit "B"

Luncheon



Facility Name
City, State
Month, Day, Year

Exhibit "B"

RLI Faculty



Facility Name
City, State
Month, Day, Year

Exhibit "B"

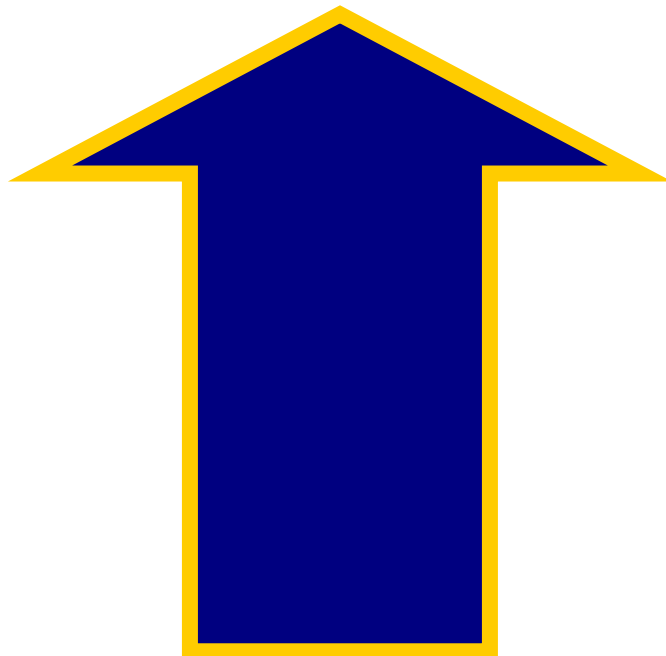


Exhibit "B"

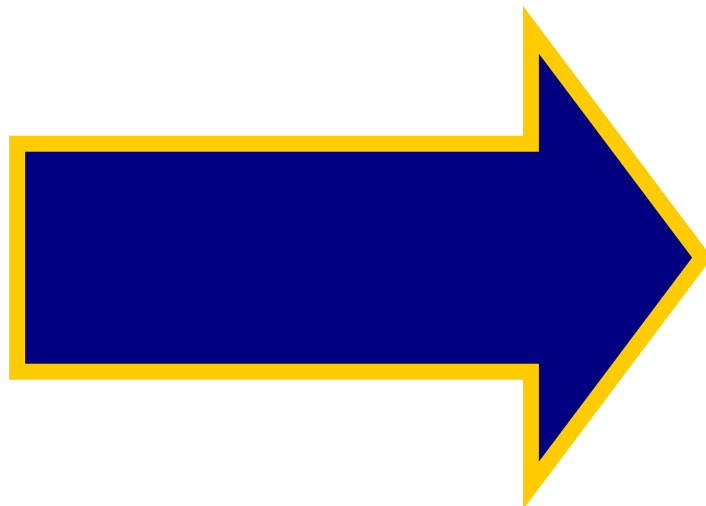


Exhibit "B"

