



Bank Club Director Event Planning Guidelines HCI Best Practices

HCI has endeavored to create guidelines to assist the club director in planning tours, both bank-planned and PTO-planned, as well as non-travel club events. The primary goal in the timing of the planning of either, is to get the event into the club newsletter at least twice before the sign-up deadline. We understand that the frequency of newsletters varies from club to club. Therefore, the “deadline” that we have established is based on the club director’s submission deadline for their own newsletter.

It is helpful to identify some examples of “non-travel events” as well as the generic task list associated with planning a non-travel event. Of course, there are many other fine details around these general tasks, but the club director can decide how much of the details must be finalized before being able to announce the event in the newsletter.

While we recommend that club directors give themselves plenty of planning time for their events, we also want to encourage spontaneity and taking advantage of last-minute opportunities that might present themselves. While it can be stressful to put together an event in a very short period of time, it can prove to be very successful and afford some unique experiences to your members that they might otherwise miss. Don’t ever feel as though you can’t put together a great event in less time than you typically do. If you put in the effort, you can do it!

Common non-travel events

Annual Events:

Luncheon
Picnic
Dinner
Holiday Open House

Quarterly Events:

Craft/Art class
Cooking class
Workshop/education session
Wine & cheese social

Monthly Events:

Bingo/Game event
Movie
Fitness class - chair yoga, waltzing class, stretching to prevent falls
Coffee Date
Open House at the bank

Volunteering events can be done monthly, quarterly, annually or randomly

Non-travel Event Task List

- Create event - set up file
- Pick a date, time
- Set RSVP deadline
- Identify location and reserve it
- Market - include cost information
- Determine the program
- Secure program elements
 - Invite a speaker
 - Hire entertainment
 - Order food and drink
 - Movie Licensing if in bank
- Arrange for Liability waivers

STARTING POINT: Create an annual calendar of events that is updated at least on a quarterly basis, so you are always at least 12 months ahead for planning. All events should go on this calendar including monthly, quarterly and annual local events as well as all travel plans for group touring - including day trips, bank operated short trips, PTO domestic travel and PTO international travel.

Example: During any quarter of any year, you should update your calendar all the way through 15 months later (e.g. March 2019, you should update the calendar through June 2020).

GENERAL PLANNING PRINCIPLES: Regular Non-Travel events, whether Monthly, Quarterly or Annual. These are guidelines only, and there are always exceptions. You should feel confident to be more spontaneous if you feel you can pull off an event in a shorter time frame.

- A. Every event should appear in at least two Newsletters (#1 furthest out and #2 closest to event).
- B. Nearly all arrangements and decisions must be completed by the deadline for submission for #1 Newsletter.
- C. For regular events (usually the monthly ones) that have simple or recurring program elements (speakers, entertainment, and so on), we recommend that all work to complete event preparations be finished one month prior to #1 Newsletter submission date.
- D. For regular events that do have critical program elements, we recommend the work begin at least 2-1/2 months before submission date of #1 Newsletter. The more complex the programming – including the need to book popular speakers, entertainers, purchase tickets and so on – we recommend at least 6 months before submission date of #1 Newsletter.
- E. Follow all payables dates based on any contracts.

Example:

Event Date: April 30, 2020

Newsletter Frequency: Bi-monthly (every two months) with copy due 10 days before printing

Planning Key Dates:

April 30, 2019 - Should be placed on Annual calendar

June 15, 2019 - Begin work if event has complex programming elements

October 1, 2019 - Begin work if event has heavy programming elements

November 15, 2019 - Begin work if event does not have heavy programming elements

December 15, 2019 - All work completed to meet deadlines for two Newsletters for Jan/Feb and March/April

Other items to consider for all events:

Liability waiver insurance at the event spot - put in to identify location and to reserve it.

W-9 must be completed for every vendor the club pays.

GENERAL PLANNING PRINCIPLES: Travel events.

- A. Bank Planned Travel
 - a. Book motorcoach and any critical event tickets when decision is made on trip.
 - b. Book everything else so that you reach at least 2 Newsletter deadlines for Day Trips and 3-4 Newsletter deadlines for short domestic motorcoach trips.
 - i. Keep running every trip that is being offered in every Newsletter until the trip runs or is sold out.
 - c. Day Trips
 - i. Decision of where to go at least 6 months in advance
 - d. Short Motorcoach Trips
 - i. Decision of where to go at least 1 year in advance
- B. PTO Planned Travel
 - a. Once contracted with PTO follow the deadlines as contracted.
 - b. Plan to have all trips in 3-4 newsletters and at least 1 Newsletter before any travel shows that are planned.
 - i. Keep running every trip that is being offered in every Newsletter until the trip runs or is sold out.
 - c. Domestic Tours
 - i. Decision on what tour to offer 9 months to 1 year in advance
 - d. International Tours
 - i. Decision on what tour to offer at least 1 year in advance

Example of Bank Planned Short Motorcoach Tour:

Event Date: September 30, 2020

Newsletter Frequency: Bi-monthly (every two months) with copy due 10 days before printing

Planning Key Dates:

September 30, 2019 - Place on annual calendar

- Book critical tickets and motorcoach immediately
- Begin work on other planning elements

December 15, 2019 - All planning work completed to meet deadline for first of four club newsletters (Jan/Feb, Mar/Apr, May/Jun and Jul/Aug)