HOW TO – PLANNER

PURPOSE: To pre-plan events promptly and on time.

OWNERSHIP: The planner should be set up for the entire year by the VP of Marketing. While anyone can contribute to the planner, the VP of Marketing is responsible for ensuring it stays on track and if any communication is any missing information. Be sure to tag all relevant parties for each event in the planner so they receive email reminders if any item still needs to be completed.

GOAL: Work at least one month ahead. For example, events happening in July must be solidified by mid-June. This gives the VP of Technology and Marketing the second half of the month to solidify the remaining duties by June 30th.

INFORMATION GATHERING: Each team must provide all necessary information by the 15th of the preceding month. All communication about each event should be submitted via the Event Submission Template on Microsoft. The VP of Marketing will then transfer this information to the planner. The formatted template ensures that all vital information is captured.

PLANNER DATES: The start and due dates in the planner are associated with when the information is due, not the actual event date. For example, for a July Member's Mingle, the start date would be June 1st, and the due date would be June 15th.

EVENT DATES: The actual event details should be displayed in the "Notes" section of each event. Member's Mingle is typically at the beginning of the month, Chapter Program is in the middle, and Momentum Mondays are on the last Monday of the month. The President establishes these dates at the start of the year, but minor changes can occur throughout the year.

MONTHLY EVENTS: We aim to complete 3-4 events each month. Each month will include a Member's Mingle, Monthly Chapter Program, and Momentum Mondays, with a virtual New Member Orientation held quarterly. This information is added to the Monthly Memo email blast on the first of each month, allowing all members to plan and register in advance.

TASK COMPLETION: Each month, once you complete an item on the checklist, mark it as done. Once all items on the checklist are completed, change the "progress" status to Completed. After completing all events for the month, move them to the end of the list to prepare for the next month's tasks.

FOLLOWING YEAR: Respectfully duplicate "TEMPLATE Event Calendar" and change the name to the next year for the (new) VP of Marketing, making sure everyone gets a fresh organized start. If any updates are needed from what you have learned, please ensure they are implemented for next year's board members.

I HAVE CREATED THE MOST CRITICAL INFORMATION NEEDED AND WHO COULD PROVIDE THAT INFORMATION TO EACH EVENT IN THE TABLES BELOW.

MEMBER SPOTLIGHT	
Beginning of the Month	
Owned By	VP of Marketing
Copy in the "Notes"	
Member Spotlight: **Name:** Insert **Title:** Professional Title at what Company **Featured Detail:** Try to keep this within 3-4 sentences that contains any recent news like career achievement, certification gained, any degree earned, community work, etc.	
Needs in Checklist & Who the Contact Is	
Member Spotlight Form	Nominator Fills Out Members Spotlight Form
Headshot(s) Attached	Nominator Attaches
Graphic Attached	VP of Marketing
LinkedIn Reminder Post	VP of Marketing Schedules 1 Week Before Event

MEMBERS MINGLE	
Beginning of the Month	
Owned By	VP of Membership
Copy in the "Notes"	
Event Date: Day of the Week, Month Day **Event Time:** Time PM-Time PM **Location:** Virtual / Name of Place **Address:** Street, City, State, Zip Code **Copy:** Enter All Copy from the Event Submission Template	
Needs in Checklist & Who the Contact Is	
Confirmed Location	VP of Membership
Graphic Attached	VP of Membership
Wild Apricot Link	VP of Technology enters in the "Comment" Section
LinkedIn Reminder Post	VP of Marketing Schedules 1 Week Before Event
Added to Monthly Memo	VP of Marketing

MONTHLY CHAPTER PROGRAM	
Mid of the Month	
Owned By	VP of Programs
Copy in the "Notes"	
Event Date: Day of the Week, Month Day **Event Time:** Time PM-Time PM **Location:** Virtual / Name of Place **Details:** Zoom Link / Address **Title of the Event:** Enter Copy from the Event Submission Template **Event Description:** Enter Copy from the Event Submission Template **Speaker #1:** **Name:** Insert **Title:** Professional Title at what Company **Bio:** Try to keep this within 3-4 sentences.	
Needs in Checklist & Who the Contact Is	
Confirmed Location	VP of Programs
Headshot(s) Attached	VP of Programs
Graphic Attached	VP of Marketing
Wild Apricot Link	VP of Technology enters in the "Comment" Section
LinkedIn Reminder Post	VP of Marketing Schedules 1 Week Before Event
Added to Monthly Memo	VP of Marketing

MOMENTUM MONDAYS	
End of the Month	
Owned By	VP of Professional Development
Copy in the "Notes"	
Event Date: Day of the Week, Month Day **Event Time:** Time PM-Time PM **Location:** Virtual **Details:** Zoom Link **Title of the Event:** Enter Copy from the Event Submission Template **Event Description:** Enter Copy from the Event Submission Template **Speaker #1:** **Name:** Insert **Title:** Professional Title at What Company **Bio:** Try to keep this within 3-4 sentences.	
Needs in Checklist & Who the Contact Is	
Confirmed Zoom Link	VP of Professional Development
Headshot(s) Attached	VP of Professional Development
Graphic Attached	VP of Membership
Wild Apricot Link	VP of Technology enters in the "Comment" Section
LinkedIn Reminder Post	VP of Marketing Schedules 1 Week Before Event
Added to Monthly Memo	VP of Marketing

MEMBER ORIENTATION	
Every Quarter	
Owned By	President
Copy in the "Notes"	
Event Date: Day of the Week, Month Day **Event Time:** Time PM-Time PM **Location:** Virtual / Zoom **Registration Link:** Insert Link Here **Cost:** FREE	
Needs in Checklist & Who the Contact Is	
Zoom for Wild Apricot	President
Graphic Attached	President
Wild Apricot Link	VP of Technology enters in the "Comment" Section
LinkedIn Reminder Post	VP of Marketing Schedules 1 Week Before Event
Added to Monthly Memo	VP of Marketing

MEMBERS MEMO	
Beginning of the Next Month	
Owned By	VP of Marketing
Copy in the "Notes"	
The checklist below pertains to any news that should be included in the Monthly Memo in addition to our regular events.	
Needs in Checklist & Who the Contact Is	
President	President any update to add
VP of Technology	VP of Technology any update on Degreed
VP of Sponsorship	VP of Sponsorships any update
Test Memo	VP of Marketing
Schedule Memo	VP of Marketing