



# **Rotary Club of Oak Bay**

## **Preferred Practices**

### **For**

# **Organizing Luncheon Speakers**

#### **An important note for the users**

*The attached Preferred Practices are written to enhance, and in some respects to standardize, various key activities in our club. They should be treated and used more as guidelines than as a rigid set of rules and regulations. In no way should independent thought and initiative be curbed as a result of adopting the Preferred Practices.*

*Please remember that Preferred Practices stem from our Club's combined experience in organizing activities efficiently and smoothly. If there is a doubt that a particular Preferred Practice is impractical, or it is non-functional due to a particular set of circumstances, please bring it to the attention of the person responsible for Knowledge Management or the Club President or any Board Member.*

*It is emphasized that this document merely gives guidelines to committee chairs and other Rotarians, and neither the Rotary Club of Oak Bay nor the persons who have written this document will be held liable in any event.*

**Rotary Club of Oak Bay  
Preferred Practices  
For  
Weekly Organizing Luncheon Speakers**

**KEY FUNCTION**

To ensure a well-balanced, organized and smoothly run speaker program at every club meeting.

**AIM OF THIS DOCUMENT**

To provide guidance to those members tasked with selecting, contacting and scheduling the weekly speakers.

**PREFERRED PRACTICES**

The Club President is responsible and has final say on what the meeting programs will be. The Administration Director can assign the responsibility for the scheduling of speakers to a club member or take it on himself. This task is referred to as The Organizer.

The Organizer takes direction from the President but is often given free rein to select and arrange for speakers. The ultimate goal is to have presentation topics which follow the Rotary monthly theme but also vary from general interest to charitable causes. This often proves difficult to achieve.

The suggestions for speakers can come from:

- Unsolicited emails from the public
- Club members
- The President.
- A Club Member Vocational Presentation

This task of collecting various suggestions can be assigned to one or two club members.

The Organizer is tasked with:

- Contacting the potential speaker
- Settling on a date for the presentation
- Preparing a formal Rotary confirmation letter (template letter modified)
- In the week preceding the presentation date, requesting a short bio from the speaker.

- Preparing and sending a thank you Rotary letter (template letter modified) to the speaker.
- Maintaining a digit schedule of the speakers for publishing on the club website.

## **RISK MANAGEMENT**

At present there are no risk management guidelines for this preferred practice.

## **APPENDICES**

Examples of Letters to speakers (external and internal), Thank you letter and speaker schedule for the Rotary year

This Preferred Practice is compiled by:

Rotarian Bob Schelle

Date first written: May 2017

Approved by the Board of Rotary Club of Oak Bay – June 19, 2017

## Examples of Letters

### Appendix 1 – Letter to Speaker

# Rotary



Service  
above Self

May 18, 2017

Dear Krissi,

Re: Rotary Luncheon Presentation

The Rotary Club of Oak Bay is looking forward to your presentation on Tuesday, June 13, 2017. Your topic will be “Victoria Brian Injury Society”. The purpose of the speaker series is to inform, educate, engage, enliven and entertain our members. It is not an opportunity for political campaigning or fundraising, nor is it expected that there will be any promotion or marketing of business or professional services.

Our meeting starts at 12:15 pm and members usually arrive about noon. The format will be lunch, club business and then your presentation, starting at approximately 1:00. Your talk should be about 20 - 25 minutes maximum, ending no later than 1:25 pm. As our meeting finishes at 1:30 pm, you may want to leave a few minutes at the end of your presentation for questions from our members.

The Oak Bay Beach Hotel is equipped with a range of professional amenities, state-of-the-art audio-visual equipment, quality sound and lighting and teleconferencing. The David Foster Foundation Theatre has a 13’ screen and LCD projector, both mounted to the ceiling. We ask that the Oak Bay Beach Hotel computer be used for any information to be shown on the screen. In order to do this, we require the information on a thumb drive, disk, or DVD. You also have access to the podium and microphone. Wi-Fi is available, throughout the Hotel.

Keep in mind, if you prefer, you can just talk without using any of the presentation equipment.

You are requested to send a short bio of yourself, which will be used by our club member who will be introducing you. Provide me with the topic of your presentation so that I may advise our members. Also you are invited to submit a summary of your presentation (250 words) which will be uploaded to our website.

You are welcome to bring informational materials for members to read.

The Rotary Club of Oak Bay will cover the cost of your lunch. For any other people coming with you, the cost of their lunch will be \$21.00. If you have any dietary concerns, please let me know in advance.

**Date:** June 13th, 2017

**Time:** 12:00 noon for 12:15 pm start, meeting ends 1:30 pm sharp

**Where:** Oak Bay Beach Hotel – David Foster Foundation Theatre  
1175 Beach Drive, Victoria BC  
250-598-4556  
[Click here](#) for directions to the Oak Bay Beach Hotel  
There is free onsite and street parking available.

Yours truly

Bob Schelle  
Director, Club Administration  
Rotary Club of Oak Bay  
250 477-7774

## Appendix 2 –Speaker (Club Member) Letter Template



February 28, 2017

Dear Janna,

Re: Rotary Luncheon Presentation

The Rotary Club of Oak Bay is looking forward to your presentation on Tuesday, May 2, 2017. The topic will be Challenges facing Young Female Entrepreneurs.

Our meeting starts at 12:15 pm and members usually arrive about noon. The format will be lunch, club business and then your presentation, starting at approximately 1:00. Your talk should be about 20 - 25 minutes maximum, ending no later than 1:25 pm. As our meeting finishes at 1:30 pm, you may want to leave a few minutes at the end of your presentation for questions from the club members.

You are requested to send a short bio of yourself, which will be used by our club member who will be introducing you. Also you are invited to submit a summary of your presentation (250 words) which will be uploaded to our website.

**Time:** 12:00 noon for 12:15 pm start, meeting ends 1:30 pm sharp

**Where:** Oak Bay Beach Hotel – David Foster Foundation Theatre  
1175 Beach Drive, Victoria BC  
250-598-4556

Yours truly

Bob  
Bob Schelle  
Director, Club Administration  
Rotary Club of Oak Bay

## Appendix 3 – Thank you Speaker Letter Template



May 18, 2017,

Dear Emerald,

Re: Rotary Luncheon Presentation

Thank you very much for taking the time to come and speak to our Club on May 16th, 2017. Your presentation on the Animal Communications was well received.

As a token of our appreciation we will be acknowledging you in the Oak Bay News sometime during the course of the year. Refer to [www.oakbaynews.com](http://www.oakbaynews.com).

Once again thank you for your presentation.

Yours sincerely,

Bob

Bob Schelle  
Director, Club Administration  
Rotary Club of Oak Bay  
2016-2017

## Appendix 4 – Speaker Schedule Template

MAY - YOUTH SERVICES	
DATE	SPEAKER & TOPIC



## Appendix 5 - Example of a Yearly Program Template

Program Schedule as of Year -					
July <i>The New Rotary Year</i>		November <i>Rotary Foundation</i>		March <i>Water &amp; Sanitation</i>	
5		1		7	
12		8		14	
19		15		21	
26		22		28	
		29			
August <i>Membership and New Club Development</i>		December <i>Disease Prevention &amp; Treatment</i>		April <i>Maternal &amp; Health Care</i>	
2		6		4	
9		13		11	
16		20		18	
23		27		25	
30					
September <i>Basic Education &amp; Literacy</i>		January <i>Vocation Service</i>		May <i>Youth Services</i>	
6	TRUDY PAULUTH- PENNER	3		2	
13		10		9	
20		17		16	
27		24		23	
		31		30	
October <i>Economic &amp; Community Development</i>		February <i>Peace &amp; Conflict Prevention/Resolution</i>		June <i>Rotary Fellowship</i>	
4		7		6	
11		14		13	
18		21		20	
25		28		27	