**Steps for Holding an IEEE Local Tour**

**Version 1.0, 2014-03-14**

**In preparation:**

* Identify a date, Facility to tour and contact at the facility.
* Contact Facility Host.
  + Confirm dates and time.
  + ASK about restrictions & special requirements.
    - Competitor exclusions.
    - Citizen requirements.
    - Attendee pre-approval requirement.
    - Clothing restrictions.
    - Government –issued ID required?
    - Cell-phone/camera restrictions.
    - Age restrictions (e.g.no minors).
    - Physical requirements (e.g. have to climb stairs).
    - Logistical limitations (e.g. will tour in groups 10 or fewer).
* Determine a location for fellowship and/or dinner after tour if desired. Contact establishment regarding groups.
* Create maps to tour-facility & fellowship/dinner location (e.g. Google maps). SAVE LINKS to embed (several times) in all announcements.
* Create Meetup & vTools announcements.
  + Include RSVP person (automatic in Meetup; required entry in vTools meetings).
  + Include organizers contact information.
  + Contact student chapter leaders to help promulgate information to student members.
* Duplicate meeting info in IEEE vTools.
* Create and send IEEE e-notice.
* Notify associate groups, e.g. ASME, AEE, AIA (include plans for gathering these RSVPs)
* Gather RSVPs

**Day before event (or earlier if required):**

* Reconfirm with host that Tour is a “go.”
  + Ask about using a particular entrance.
  + Ask whether security needs to be notified about visitors.
* Share RSVP information (count, name list, etc.) with Tour host
* Share expected headcount with post-event location.

**On day of event:**

* 4 hours before: Drive all around venue so you can answer the “I don’t where I am, but I see a Citgo station…. how do I get there from here?” questions.
* 30 minutes before: Place IEEE or direction signage (if used).
* 20 minutes before: meet with host & discuss last minute logistics, changes, etc.
* As attendees arrive: Welcome IEEE members to the meeting, talk to them one on one. Make sure they feel welcome
* At meeting time: Welcome all attendees, inform them of emergency exit, bathrooms, etc. Discuss IEEE and its benefits. Announce other upcoming meetings. Sell registering for Meetup. Introduce speaker.
* After tour:
  + Assist with collection of host’s equipment (e.g. walkie-talkie, hard-hats).
  + Thank attendees for attending, recognize host & reiterate IEEE benefits.
  + Renew invitation for dinner/drinks (if scheduled) & help with directions, car pools, etc.

**Later – after tour:**

* Send a thank you note to host; share comments from attendees.
* Report attendance in vTools.
* Send attendance confirmations for CE/PDH credits (for members requesting them).

**History:**

2014-03-14 - Original