

PREPARATION GUIDE FOR AN EFFECTIVE EVENT

IDENTIFY THE 3 CORE GOALS FOR THE EVENT

SAMPLE GOALS:

- To engage identified potential donors in an opportunity to learn about the organization and mission.
- To raise money for support of specific programs
- To establish a signature event for yearly convening of donors and supporters as a thank-you opportunity

ASSESS CAPACITY TO IMPLEMENT EVENT

SAMPLE QUESTIONS TO ANSWER:

- Do I have staff and board support?
- What is my budget for the event?
- What scale of an event do we want and what can we handle?
- What amount of time will this event take away from other responsibilities and how will I delegate during this time?
- Have we developed relationships with potential sponsors who will be willing to underwrite the event?
- Are there at least two committed board leaders willing to chair and work on creating a successful event?
- Are board and staff members committed to inviting identified guests?
- Do we have the infrastructure needed to implement the invitation process as well as the follow up process?

CREATE AN EVENT PLAN AND GOALS FOR EACH ELEMENT

INCLUDE THIS INFORMATION IN YOUR PLAN:

- Articulate the goals of the event in the plan and identify what your intended end result. Example: Our goal is to develop a circle of dedicated supporters. Our intent for the event is that these potential donors will leave having had a fun and positive experience, understanding the impact of the organizations on a deeper level, and will have been inspired to commit to a donation that evening.
- Identify Event Chairs and Committee Members
- Identify the type of event: Breakfast Awareness Event, Dinner Reception, Annual Meeting, Auction, Road Race, Open House, and Annual Luncheon.
- Identify revenue sources for the funding of the event e. Created a targeted guest list
- Plan for how the guests will be invited and how you will cover the costs of the invitation (e-mail, print, phone call or combination)
- Create an agenda for the event program which supports the articulated goals of the event and the intended outcomes.
- Decide who will participate in the agenda: who will welcome guests, who will speak, who will recognize sponsors, what kind of presentation or video will be shown, who will close the event.



- Determine roles for board, staff, and volunteers: who will be greeters, table hosts, address invitations, staff the reception table, follow-up with thank-yous, secure auction items, set up and break down?

CREATE A PLAN FOR THE “ASK” DURING AND AFTER THE EVENT

Think through and identify actions for intentional donor stewardship and invitations to give during the event.

PLAN FOR THE FOLLOWING:

- How will guests provide all their contact information: At the registration table? On the return invitation? To bid on an auction item?
- What takeaways will you have at each table or at each golf whole or during an open house that guests will be given?
- Who will be assigned to individually engage the guests in conversations about the mission and impact of the program?
- In what way will you leave a deep impression on the guests; will there be a passionate presentation of how services made an impact? A video? In what way will you leave the guests remembering 3 bold things about your mission impact?
- Identify ways in which to make the event fun for you guest and inspire a sense of “community.” Create an activity in which they learn more about the mission.
- Identify and prepare the materials, donor cards and envelopes you will have at each seat.
- Identify the best person to invite the guest to be part of the mission and support the organization - often it is the Board Chair.

DESIGN THE FOLLOW-UP PLAN

Develop a distinct plan with measurable goals and timeline for follow-up to the event and ongoing stewardship thereafter.

ARTICULATE THE FOLLOWING:

- What will be the immediate follow-up thank-you communication after the event; a phone call from the board president, e-mail from the board president, letter?
- Who will take responsibility for the immediate follow-up and what will be the timeframe? For example: The Board President will send out an e-mail thanking guests the morning after the event and board members will follow this up with a phone call to express appreciation to everyone who donated.
- Three months after the event, in what way will you follow up with attendees? Send them a progress report on a program they supported? Send them a newsletter with a personal note?
- Six and twelve months after the event ...what will you have done to keep the donors engaged? Send them the annual report, invite them to visit the organizations, conduct a personal visit?
- Identify the back-up resources you will need to keep this ongoing stewardship in motion; such as: database for donor management, staff person assigned to donor development, board committee created for ongoing philanthropic development.

