

# Preparation Guide for an Effective Event

## Identify 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 & 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-you letters, 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 hole 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.

