

Track15 Event Management

Guide to in-person and virtual
event planning



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THE BIG QUESTIONS

WHY ARE WE DOING THIS AND WHAT IS THE NEED?

Meaning lies in specificity. When we assume the purpose is obvious, we miss the opportunity to create a meaningful gathering.

Before you starting planning, list three accomplishments you wish to achieve at this event:

Accomplishment 1:

Accomplishment 2:

Accomplishment 3:





THE BIG QUESTIONS

WHO IS THIS EVENT FOR?

How are we going to make decisions around who is invited? What will the criteria be?

- 1.
- 2.
- 3.

*A note on the highly-varied guest list. More varied gatherings can lead to a gathering not being truly meaningful to anyone. Your guest list should reflect the rich diversity of your organization while not being so inclusive that the meaning loses its purpose to your guests. There should be a commonality between guests.



FORM FOLLOWS FUNCTION




PRIORITIZE THE FUNCTION

An event should be held from a place of purpose, not duty or expectation.

Determining these specific aspects of your event can help define purpose:

- What is the name of your event?
- How can you be explicit in your expectations?
- How can you orient your guests prior to the event?

*A note on guidelines and expectations. Many people have a fear of not wanting to impose. However, rules can put guests at ease. When expectations are clear guests spend more time open to what the experience is and less time trying to figure out what the purpose is.





FUNDRAISING OBJECTIVES

EVENTS ARE A PIECE OF THE PIE

Your organization should be priming your guests throughout the entire year through a diverse array of fundraising practices. Nonprofits who have a holistic approach to fundraising are better off than organizations that rely solely on events.

Other fundraising efforts include:

- Annual Giving Campaigns
- Major Donor Relationship Management
- Grants and Foundation Relationship Management

Utilize your organization's data management system to inform your fundraising.

SPONSORSHIPS

PROVIDING THE MOST VALUE TO YOUR SPONSORS

- Develop mutually beneficial co-sponsoring opportunities for individuals and businesses
- Use success metrics as tools to entice sponsors
- Reinvent the sponsorship packet
- Think of your sponsors as impact investors

SPONSORSHIPS- CORPORATIONS

Nonprofit

- Increase Exposure
- Acquire New Supporters
- Legitimize your Organization

Corporation

- Improve perception
- Attract new customers
- Engage employees

SPONSORSHIPS- CORPORATIONS

Search for a brand's:

- Mission
- Vision
- Values
- Social Responsibility
- Latest Press
- Social Media Search
- Are they struggling too?
- Where can you help each other?
- What do you donors and their consumers need / would be of value?

SPONSORSHIPS- CORPORATIONS

Corporation:

- We're struggling to push these products or services OR
- We're thriving as an e-commerce brand!

Nonprofit Solution:

- Create a virtual gift bag
- Provide discount code to all attendees
- Drive-through to pick up gift bag or food and beverage
- Create a partial proceeds program
- **Storytelling throughout the year**

Don't think there is any alignment between your organization and a corporation?

Cora Tampons Mission Statement:

*We're committed to giving all women **access** to safe and effective **period** products as well as valuable and trustworthy information to **educate** and **empower**.*

Organization committed to preventing teen pregnancy:

*Giving teens and parents **access** to evidence-based sexuality **education** materials; helping them to feel **empowered** when it comes to their **reproductive** choices.*

SPONSORSHIPS- INDIVIDUALS

Nonprofit

- Cultivate new and existing donors
- Provide funding for your programs
- Underwrite your event

Individual

- Impact a cause they are passionate about
- Engage friends, family, and colleagues with the organization
- Engage with the organization outside of volunteering

SPONSORSHIPS- THE PACKET

Traditional sponsorship benefits are not enough anymore, especially for virtual events.

- Provide opportunities for partnership throughout the entire year
- Include the story of that partners impact in marketing material as a way of enticing sponsors
- Include the impact of the sponsor's investment along with the benefits

SPONSORSHIPS- SUCCESS METRICS

Use the following KPIs to make a case statement for both individuals and corporations:

- Social media interactions
- Newsletters subscribers
- Event attendees
- ROI of donation or gift

SPONSORSHIPS- IMPACT INVESTMENT

What does a \$25,000 sponsorship actually do for your organization?

- Individuals and corporations want to know what their sponsorship will go towards and what impact it will have. Include that information on sponsorship benefits packets

CHECKLIST FOR FINDING SPONSORS

5-Step Checklist to Find New Corporate Sponsors

- Step 1: Write out your Impact Goal**
Impact Goal = The amount you need/want to raise and how it directly ties to your organization. Ex. Raise \$100k to support 10 scholarships for X program
- Step 2: Find potential new corporate sponsors using (tap into existing relationships, connect with your BOD, utilize social tools)**
- Step 3: Research the brand's mission, values, and current corporate social responsibility programs.**
- Step 4: Find the key decision-maker using already established connections or social tools such as LinkedIn**
- Step 5: Brainstorm creative virtual or in-person event sponsorship opportunities for the potential sponsor & impact**

3-Step Checklist to Find Individual Sponsors

- Step 1: Write out your Impact Goal**
Impact Goal = The amount you need/want to raise and how it directly ties to your organization. Ex. Raise \$100k to support 10 scholarships for X program
- Step 2: Individual Sponsors are typically repeat-high-level donors. However, by utilizing your database and other research tools you can find individuals involved in your organization who are well-suited for a sponsorship ask**
- Step 3: Brainstorm creative virtual or in-person event sponsorship opportunities for the potential sponsor & impact**

A note on underwriting - all sponsors want to ensure that the organization they support is using their money wisely. Offering underwriting and sponsorships adds transparency for your donors.

THE ROLL OUT

KEY CONSIDERATIONS WHEN DEVELOPING THE LOOK AND FEEL OF YOUR EVENT



STAGE 1

Timing is key. What just occurred in your organization? Are we going through a pandemic? What month is it?



STAGE 2

Are you going turn-key or utilizing volunteers, committee chairs, and staff?



STAGE 3

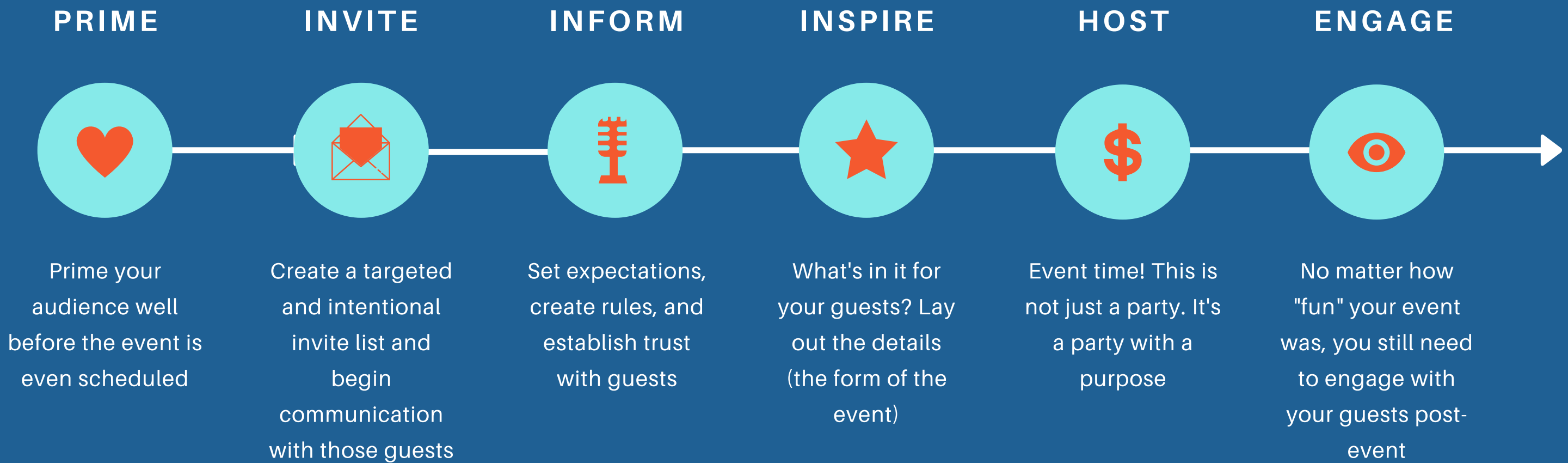
Find a venue that helps fulfill your purpose. But remember, many locations can be made to fit your need; this is especially true if you're on a tight budget.



STAGE 4

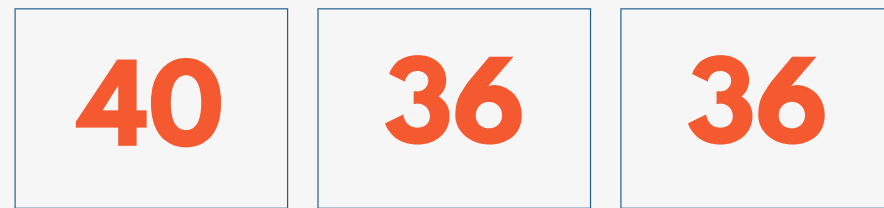
Let the other design and entertainment aspects based on stage 1 and stage 2 follow the purpose.

EVENT TIMELINE



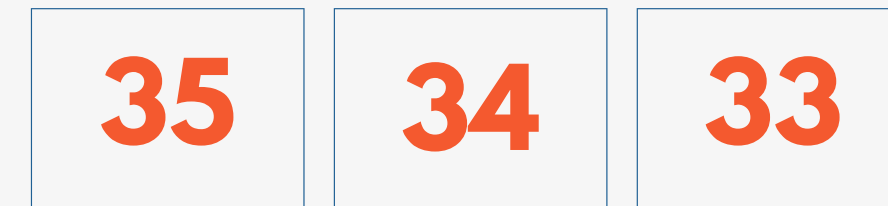
EVENT TIMELINE

EVENT OUTLINE/ROS BUDGET CREATION MARKETING CALENDAR



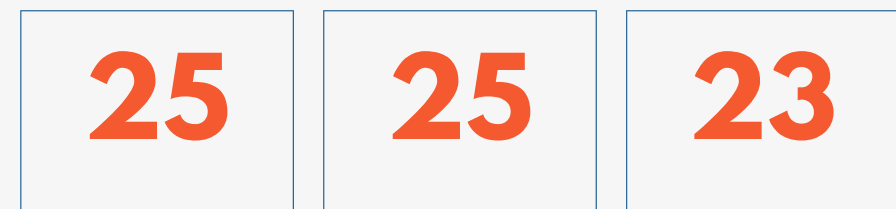
12-10 months prior to event date begin planning process and ask yourself the "big questions"

SPONSOR LIST DEVELOPED SPONSOR PACKET SPONSOR ASKS OUT



10-8 months out begin sponsorship solicitation even if you don't have all the event information finalized

EVENT SITE SECURED MISC. VENDORS MENU SECURED



8-6 months prior finalize event details like platform or "type" of event, vendors, and location

STD CREATION SITE VISIT ONE SECURE SPONSORS



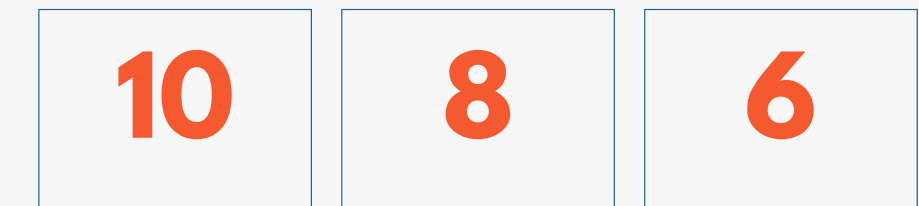
6-4 months before secure your sponsorships, send save the date, and take a tour of your venue

INVITE CREATION DECOR & LINENS STD SENT



4-3 months prior create your invitation and send your save the date. Secure all decor items.

VOLUNTEERS SITE VISIT TWO INVITE SENT



3-2 months before secure your volunteers, visit your venue for a walkthrough, and mail invitation

FINAL COLATERAL DESIGN RSVPS DUE SEATING CHAR AND GUEST LIST



The month leading up to your event should be spent finalizing all additional printed material, seating chart, and guest list

OTHER CONSIDERATIONS:

- The week and day of your event should be focused on training any staff/volunteers you have working this event.
- The run of show should be developed early in the planning process and refined over time
- A digital campaign calendar should be created in conjunction. Outlining when social media posts, email announcements, etc. will take place.

VIRTUAL EVENTS

KEY CONSIDERATIONS

- What is a virtual event
- Live streaming technology
- Priming Event Attendees
- Increasing Engagement
- Using Data



VIRTUAL EVENTS

WHAT IS A VIRTUAL EVENT

Virtual

A virtual event is an event where all activities occur online or in digital space as opposed to a physical, centralized venue.

Hybrid

A hybrid event combines components of both a physical and virtual event. This means that while a physical event is taking place in a physical space it is also being broadcasted virtually to a remote audience. The goal of a hybrid event is to provide the same experience to both audiences.

Simulive Event

A simulive event is a pre-recorded event that is broadcasted as live. There are many logistical benefits of this type of event.

PLATFORM OPTIONS

- Youtube Live
- Zoom
- Facebook Live
- Vimeo
- Onecause (and similar platforms)

VIDEO QUALITY

- Whether you stream or pre-record make sure your camera is high-quality and that proper lighting is used. High quality footage makes for a much better virtual experience.

INTERNET SPEED

- Having high-speed internet and backup WIFI options are crucial to the success of your virtual event. Lack of internet connectivity can destroy the virtual experience.

SCREEN FATIGUE

- Everyone is or has experienced some type of video conference fatigue. To combat this, try building in breaks so that your audience doesn't get tired of looking at their screen. Or better yet, pare down your programming so that your run time does not exceed an hour.



VIRTUAL EVENTS

PRIMING EVENT ATTENDEES

- **AUDIENCE:** Tell stories and ask questions to engage your audience then over-communicate instructions on how to "log-on" to the virtual experience. Consider sending multiple reminders and providing a digital or printable map of the virtual experience.
- **SPEAKERS & HOSTS:** Test their technology early and often. Make sure they are well aquatinted with run of show and do a live practice run the day of the event.
- **EXHIBITORS:** Similar to speakers & hosts, make sure third-party vendors (such as auctioneers) are well-rehearsed and test their technology prior to the event and day of the event.



VIRTUAL EVENTS


INCREASING ENGAGEMENT



THE DEFINITIVE GUIDE TO VIRTUAL EVENTS, [ACCELEVENTS.COM](https://www.accelevents.com)

STORY-TELLING

Storytelling should be implemented in the priming phase but also during your event. Storytelling allows the viewer to connect with your mission on a deeper level. This deep connection creates a more meaningful and impactful experience.



MULTISENSORY


Consider providing a box of goodies for your attendees to enjoy with all of their 5 senses while engaging with your virtual event. When we smell a sweet candle, or taste a delicious drink we are more likely to remember the occasion that engaged those senses.

SHORT AND SWEET

Sitting for long periods of time is not just bad for our health it's bad for engagement. Virtual events should not run for more than an hour. The human attention span is finite, don't stress your attendee's focus by hosting a long event. If your event has to run over an hour consider implementing a game or providing facilitated physical activity breaks

MAKE IT SOCIAL

Enable to chat and reaction function of whichever platform you decide to use. You can also utilize breakout rooms to allow your guests to converse together.





VIRTUAL EVENTS

UTILIZE DATA

This virtual event experience is still very new for many organizations. Turn to the data to help establish what works for your organization.

Ticket Sales/Registration - These numbers can help you determine the effectiveness of your event marketing campaign.

Amount of time spent logged on - Cross-reference time spent at the virtual event with what activity was happening at the time to determine which parts of your event were most well attended and had the most engagement.

Track15 Event Planning Resources

1. Dana Snyder, positiveequation.com
2. The Definitive Guide to Virtual Events, accelevents.com
3. Qgiv Partner Webinar, How to Inspire Strong Giving Through a Virtual Event

Recommended Virtual Platforms

1. Sportfive
2. Onecause
3. Accelevents
4. Hoppier
5. Fundraiseup

For more information on event planning resources please contact:

info@track15.com

