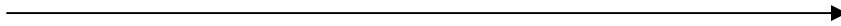


Strategic Events

Planning Guide

Introduction

Strategic events are part of a process designed to move prospects and donors along a continuum of knowledge and involvement.



From:

No awareness of the need
for community arts support.

To:

Ongoing participation
in funding community arts.

Every individual or group your community foundation seeks to engage can be placed somewhere on this continuum. A strategic event can help you move each toward active, ongoing participation in arts funding.

Getting the most from your investment in events.

Follow these three keys to success

One. Treat each event *strategically*.

Two. Recognize that each event is part of a *process*.

Three. Make and manage an event *timeline*.

Each of these success factors is further described on the following pages.

One. Treat each event *strategically*.

Approach your event as you would any marketing planning opportunity.

 Identify your **audience**.

Are you courting:

- *individual donors, families, corporate givers, local foundations?*
- *first-time donors?*
- *ongoing fund holders?*

Define your prospects—by name—and document what you know about the history, interests and motivations of each.

 State your specific, measurable **objective** for each event participant.

Is your goal to:

- *introduce the community foundation as an art funding vehicle to a new prospect?*
- *interest a current donor in opening an art advised fund?*
- *encourage a current fund holder to increase support for the arts?*

Set a realistic goal for how the event can help you with each attendee.

 Clarify your **method** for achieving the objective.

Will you:

- *seat current donors with potential donors to encourage informal exchange and learning?*
- *decide that a one-on-one conversation with an artist is essential to your success with a participant?*
- *assign and prepare staff and board members to engage individual attendees?*

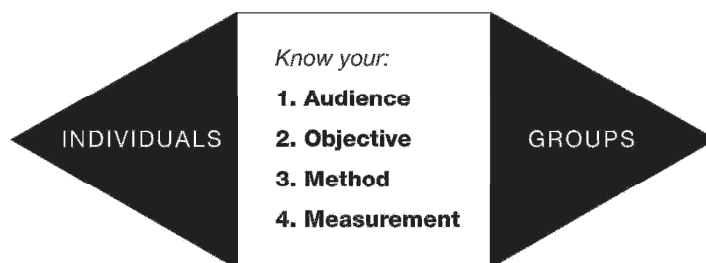
Devise a plan that makes realistic use of all your event resources to hit the goals you've set.

 Make it a point to **measure** your results.

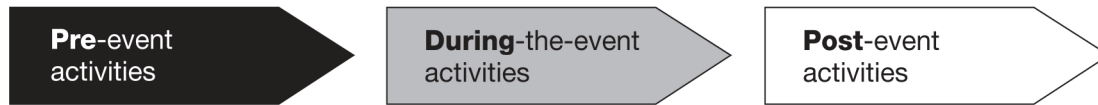
Will you have:

- *an event evaluation for participants?*
- *a follow-up report format for use by event staff and hosts?*
- *a debrief session with event planners?*

Embrace measurement. It's the only way to learn and improve your success—and to evaluate your event investment.



Whether you are focusing on individuals (e.g., accompanying a small number of donors to a performance and hosting them for a pre-event dinner) or a group (e.g., hosting a reception for a hundred art patrons), defining the above four key elements allows you to approach each event strategically.

Two. Recognize that each event is part of a process.

Every event has a before, during and after stage.

- A. Be **purposeful** with pre-event communication. What happens before the event can directly affect the quality and quantity of event outcomes.

Do invitees know that they:

- *are part of a special group?*
- *are being contacted personally?*

Do they know what to expect at the event?

Do they know you are counting on their participation?

Has their attendance been confirmed?

- B. Be **ready** for success during the event.

Work the plan—making sure that all players (internal staff and board members, guest performers/speakers, caterers, venue managers, etc.) are on the right page and ready to contribute.

Role play the event—and prepare for contingencies. Be sure there are plenty of event staff on hand and ready to lend a hand as the event unfolds.

- C. Be **disciplined** about event follow up.

Identify the set of actions you plan to take with participants—e.g., thank you notes, invitations to a lunch or meeting with development personnel, etc.

Then take action. The step *after* the event may be the most important of all.

Three. Make and manage an event *timeline*.

The details define success in the event management business. Modify and use this sample checklist to help orchestrate and implement a winning plan.

Event: _____

Countdown	Date	Task	Person(s) Responsible
5 months		<input type="checkbox"/> Define event purpose and components	
4 months		<input type="checkbox"/> Identify/confirm speaker(s)/performer(s) <input type="checkbox"/> Identify/arrange event site <input type="checkbox"/> Research/select caterer <input type="checkbox"/> Establish event budget <input type="checkbox"/> Set event date <input type="checkbox"/> Begin building database for event invitations	
3 months		<input type="checkbox"/> Identify event positioning and messaging <input type="checkbox"/> Create event visual theme <input type="checkbox"/> Identify and begin to develop materials— e.g., “save the date” postcard, invitations, RSVP, map, etc.	
10 weeks		<input type="checkbox"/> Develop event outline with times and review with speaker(s)/performer(s) <input type="checkbox"/> Draft content/presentations as necessary	
9 weeks		<input type="checkbox"/> Finalize database of invitees <input type="checkbox"/> Mail “save the date” postcard <input type="checkbox"/> Draft press release	
8 weeks		<input type="checkbox"/> Place event information on website <input type="checkbox"/> Finalize event plan with speaker(s)/performer(s); establish plan for audiovisual needs <input type="checkbox"/> Identify and recruit event “hosts” (staff, board, volunteers)	
7 weeks		<input type="checkbox"/> Identify on-site materials for event—handouts, name tags, signage	
6 weeks		<input type="checkbox"/> Collate and mail invite, RSVP, map	
5 weeks		<input type="checkbox"/> Make phone calls to key invitees	
4 weeks		<input type="checkbox"/> Arrange site logistics (including A/V equipment) <input type="checkbox"/> Prepare signage <input type="checkbox"/> Write press release	
3 weeks		<input type="checkbox"/> Contact local media with press release <input type="checkbox"/> Meet with speaker(s)/performers(s) to review final event details <input type="checkbox"/> Identify event evaluation materials (if appropriate) <input type="checkbox"/> Prepare orientation information for event hosts <input type="checkbox"/> Mail or call non-responding invitees	
2 weeks		<input type="checkbox"/> Schedule post-event debrief session	

1 week		<input type="checkbox"/> Convey final count to caterer <input type="checkbox"/> Print/collate event handouts and evaluation survey <input type="checkbox"/> E-mail and/or phone event reminders <input type="checkbox"/> Confirm final A/V arrangements with site personnel <input type="checkbox"/> Orient event hosts regarding roles, agenda, materials, follow-up reports, etc.	
BIG DAY		Event <input type="checkbox"/> Distribute and retrieve evaluation forms (if appropriate)	
Within a week after event		<input type="checkbox"/> Send personalized thank you note to each attendee; call individuals for specific follow up steps as appropriate <input type="checkbox"/> Review event evaluation forms	
Within two weeks after event		<input type="checkbox"/> Hold debrief session with event leaders and hosts <input type="checkbox"/> Document event lessons, successes and measurable outcomes	

Event Plan Summary

Putting it all together.

Event:

Date:

Audience(s):

Objective(s):

Method(s) for achieving objective:

• *Pre-event critical actions*

• *During event critical actions*

• *After the event critical actions*

Measurement(s) of success:

Budget:

Responsibility for event planning timeline:
