DONORVIEW

Event Management Outline & Checklist

Fundraising events can raise significant funds for your organization. Below are some suggestions to consider when planning, promoting, and conducting your campaign using DonorView. Please note this outline is intended as a guide, not specific requirements. There is a checklist included on the last two pages of this document.

I. Planning Stage

A. Defining goals for event

1. Establish goals for the event including:
    a. Ticket sales
    b. Sponsorships
    c. Expenses
2. Defining your goals will help you to:
    a. Identify where you should focus your resources
    b. Finalize your budget
    c. Establish targets for the number of invites and sponsorship requests based on projected response rates
        i. If past response rates were around 25% and you have a goal of 100 guests, you'll need to send out at least 400 invitations to reach your ticket goal.
        ii. From DonorView, you can create reports to identify the best prospects for your invitations based on geographical location, historical giving, and past event attendance.

B. Organize a committee

1. A committee of volunteers to help plan and host the event can help alleviate the staff time
2. Ensure you have roles and responsibilities outlined for each committee member

C. Creating a theme

1. Themes make it easier for designing promotional material and advertising.
2. A unique theme can make the event more enticing and attract new participants.

D. Determining scope and schedule

1. Set boundaries for the scope of your event to keep the team focused and help you stay on task.
2. Be sure to establish a schedule with activities listed with due dates and who is responsible.
3. Incorporate goal tracking and regular meetings to ensure progress is on track.

II. Promotion & Sales

A. Sponsorships & Ticket Levels

1. Determine what sponsorship and ticket levels you will be offering for your event.
2. For sponsorships, you can set up your sponsorships, link them to event levels, and create a list of tasks using the Sponsorships feature in the Fundraising Module.
    a. This will allow you to create tasks and follow-ups to manage the deliverables associated with those sponsorships.
    b. You can see more about sponsorships in this video https://vimeo.com/850688116/fdfeda0782 and we've just released a new feature to assign follow-ups and you can read more about this in the knowledgebase article here: https://support.donorview.com/support/solutions/articles/9000217093-how-do-i-assign-tasks-for-sponsorship-follow-ups
3. Including all your ticket levels and sponsorships on the same event page will make managing attendees much easier since only one event can be shown at a time on the Event Attendance grid.
4. If you choose to record your sponsorships manually instead of using the event page, we recommend creating some Offline Level tickets so that you can include sponsor guests along with the rest of the ticket purchases.
    a. Offline Level tickets are visible only to DonorView users who are logged into DonorView and using the same browser.
    b. You can learn more about creating ticket levels and linking to sponsorships in this video covering event set up: https://vimeo.com/736154790/28f017a613
5. Note that there are many options available for tickets including:
    a. Early bird or late registration pricing using the "Set Active Level Dates" feature
    b. Restricting levels to members only using the "Members Only" feature
    c. Allowing just a deposit for a purchase, which is helpful for some larger sponsorships where the registrant may prefer to mail a check. You can learn more about the new deposit feature here: https://support.donorview.com/support/solutions/articles/9000235798-event-level-deposits

B. Add-ons

1. Add-ons are items that do not include admission to the event. They include things like:
    a. T-shirts, hats, commemorative win glasses, and other physical items
    b. Advertising in the program, tee hole signs at golf tournaments, or banners at the event

   c. Raffle, helicopter ball drop, or game tickets
2. You can limit the quantity of add-on items that are available, for example there may only be 100 raffle tickets available for sale.
3. Add-on purchases do not show in the event attendance grid, so if you need a name associated with who is using that add-on to show in the event attendance grid, you may want to make it a ticket level instead.

C. Building the pages

1. When you are ready to begin promoting your event, build your event pages in DonorView.
2. If you are selling ticket levels that include admission for more than one person, or if ticket levels are being purchased by companies, use the Attendee Info tab to collect the names and answers to any special questions.
3. Attendee info questions can include things like:
   a. Meal preferences
   b. Seating preferences
   c. Handicap (for golf tournaments)
   d. T-shirt size
   e. Age group (for 5Ks and runs)
   f. Allergies
   g. Special needs
4. The answers to these attendee questions will be shown in the Event Attendance grid.
5. See more about the Event Attendee Info tab in this video https://vimeo.com/732471168/ab2a288419
6. If you plan to use the table assignments feature, be sure to turn this on in the Attendee Info tab at the bottom of the page. Activating this does not require that you use it.

D. Develop your marketing strategy

1. Determine what methods and channels you'll be using to market your event
2. Ensure your marketing strategy is in line with your budget
3. Within DonorView, you can utilize:
   a. The email marketing features to send out colorful invitations that include direct links to your pages.
   b. The mail merge features including envelopes and letters for paper mail invitations and sponsorship solicitations.
   c. The URLs generated from each page to link or embed on your organization's website and to share on social media.

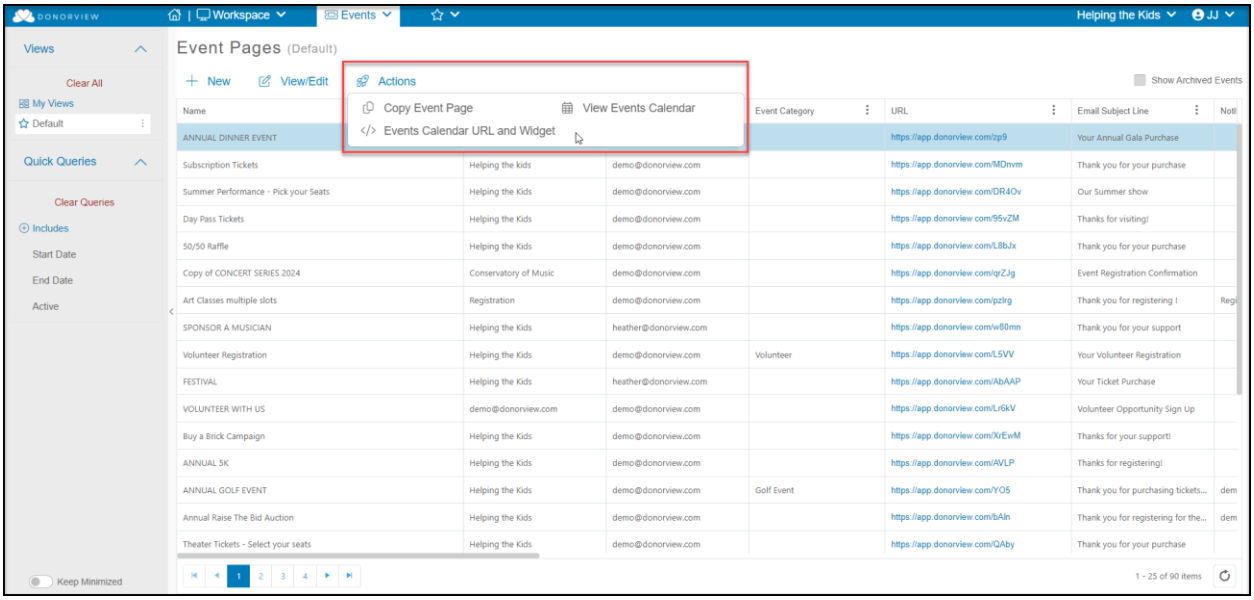
d. The QR codes that are generated on each page for inclusion in social media, advertising, brochures, posters, and other invitations.

e. Text to URL codes identified for each page can also be promoted and included in marketing.

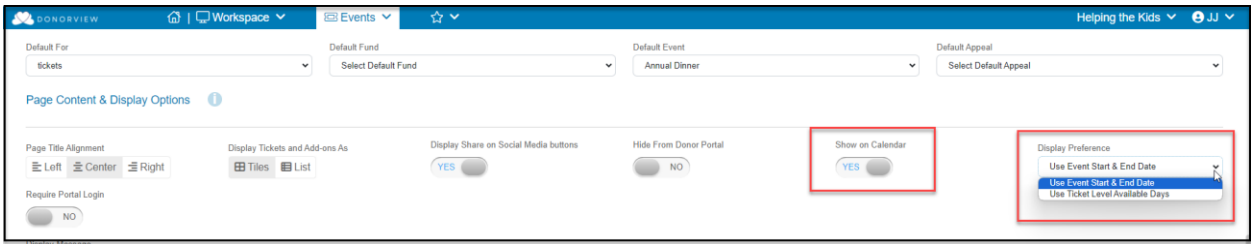
f. Direct text messaging allows you to send personalized texts to constituents and can even include a brief video message.

g. The calendar widget in the Events Page grid.

i. You can customize the calendar and get the URL to share on your website under the actions menu.



ii. Be sure that you have your event set to show on the calendar by selecting the toggle on the Event Setting Tab to "Yes." You can choose to show the "Event Start & End Date" for single day events or "Use Ticket Level Available Days" for multi-day events.



E. Tracking Sales

1. Set up milestones to track progress on your ticket and sponsorships sales. You can see all your event sales in the Events Summary grid, as well as the individual transactions on the Gifts grid.

2. Make adjustments to your marketing, promotion, and solicitation strategies as needed.

III. Pre- Event

A. Event Auto-Reminders

1. You can establish a variety of auto-reminders for your event. This video provides an overview of this feature https://vimeo.com/722260141/aa62e84e84
2. Auto-reminders can be sent to specific levels, so special messages can be directed to sponsors with a different message sent to single ticket holders.
3. Auto-reminders can be linked to the purchase date, before the event date, and after the event date.
4. You can also choose any specific date and time to send your message.
5. Note that event auto-reminders go to registrants, not all attendees. You can send messages to attendees from the Event Attendance grid.
6. If you utilize the portal, your event registrants can also reprint their own tickets and update guest information from the portal.

B. Credit Card Swipers

1. If you will be selling tickets at the door you can rent special credit card swipers that sync with the DV Connect mobile app.
2. Be sure to order your swipers by contacting support@donorview.com at least 3 weeks prior to your event.
3. You can learn more about the features of the DV Connect mobile app and how to use it in these videos:
    a. Mobile App - iPad: https://vimeo.com/738265241/450ca22c8a
    b. New Stripe Swiper - https://vimeo.com/1024079232/ec89adabb3
    c. ID Tech Swipers - https://vimeo.com/1024081097/a09b8ceeed

C. Managing attendees

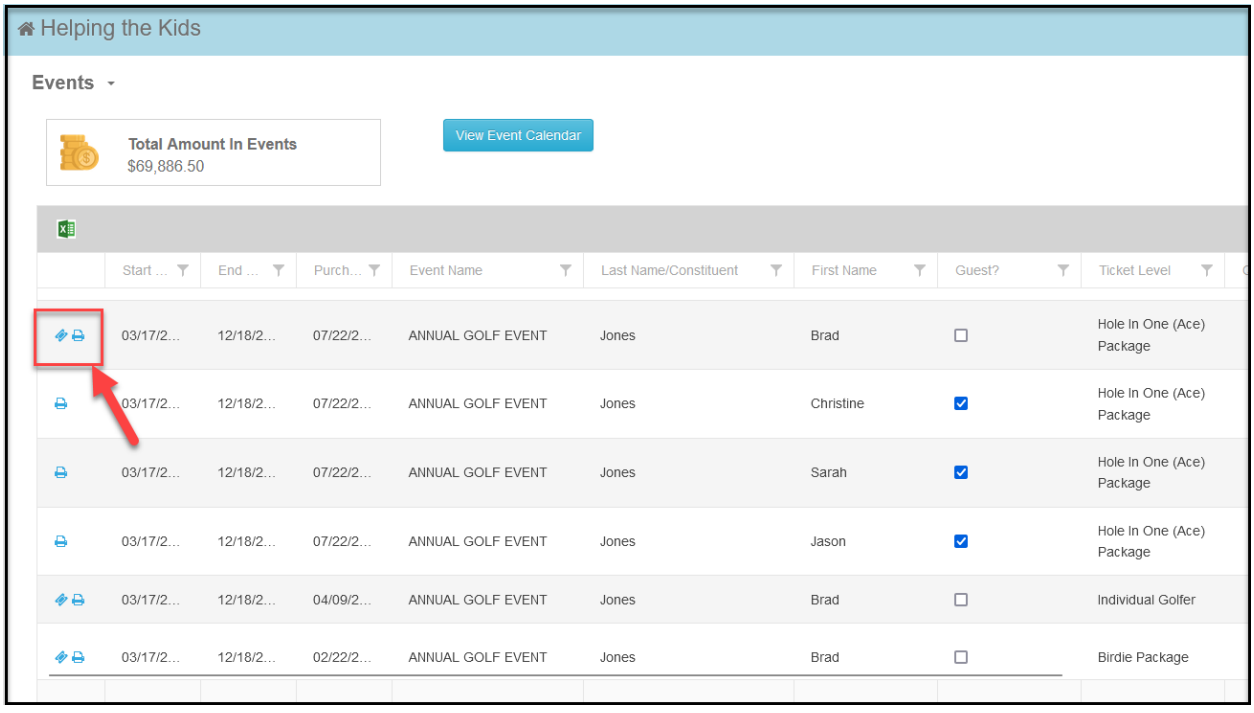
1. Communications
    a. You can find a list of all registrants and attendees in the Event Attendance grid.
    b. If a registrant does not know the names of their guests, you will see the registrant's name as a placeholder in the attendee name column.
    c. To update attendee name information or collect answers to attendee questions, you can reach out to the registrants.
        i. To contact all the registrants, use the Direct Email feature in the Actions menu.
        ii. If you have just a few to contact, you can find their email address on the Event Attendance grid under the column titled

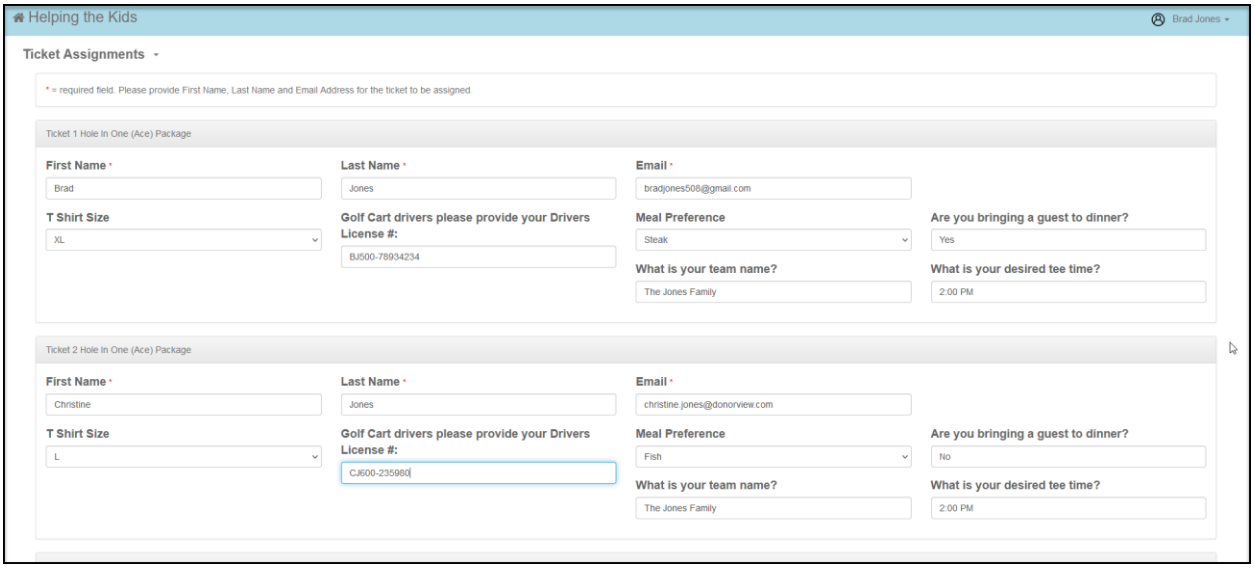
E-mail and click on their email to send just one direct email to that constituent.

iii. If you have text messaging activated, you can also send a text message requesting the information – note that this message will be sent to both registrants (purchasers) as well as attendees, so be sure to filter your list appropriately to contact only those necessary.

iv. You can also create an email list just for the purchasers by using the Actions Menu in the Summary view of the Events Grid.

2. Using the Donor Portal
    a. If you have the Advanced Portal activated, you can also have event attendees use the portal to update their own information.
    b. Be sure you have included the Events module in your portal view.
    c. Attendees can log in, go to the Events icon and see all their ticket purchase history.
    d. They can reprint their tickets by clicking on the printer icon.
    e. They can edit their guest and attendee info questions by clicking on the ticket icon.

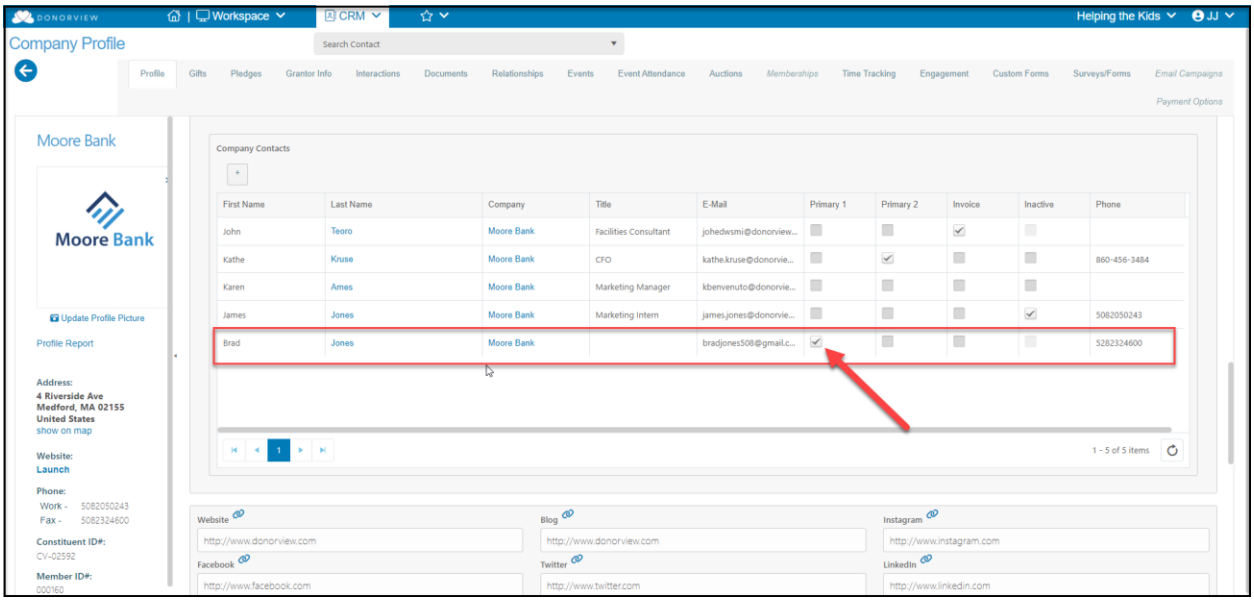




f. Note that only the ticket purchaser has access to this information.

g. For ticket or sponsorship purchases made by a company, the primary contact will login to manage the guests.

h. You can find or designate the primary contact for a company on their profile page at the bottom of the page.

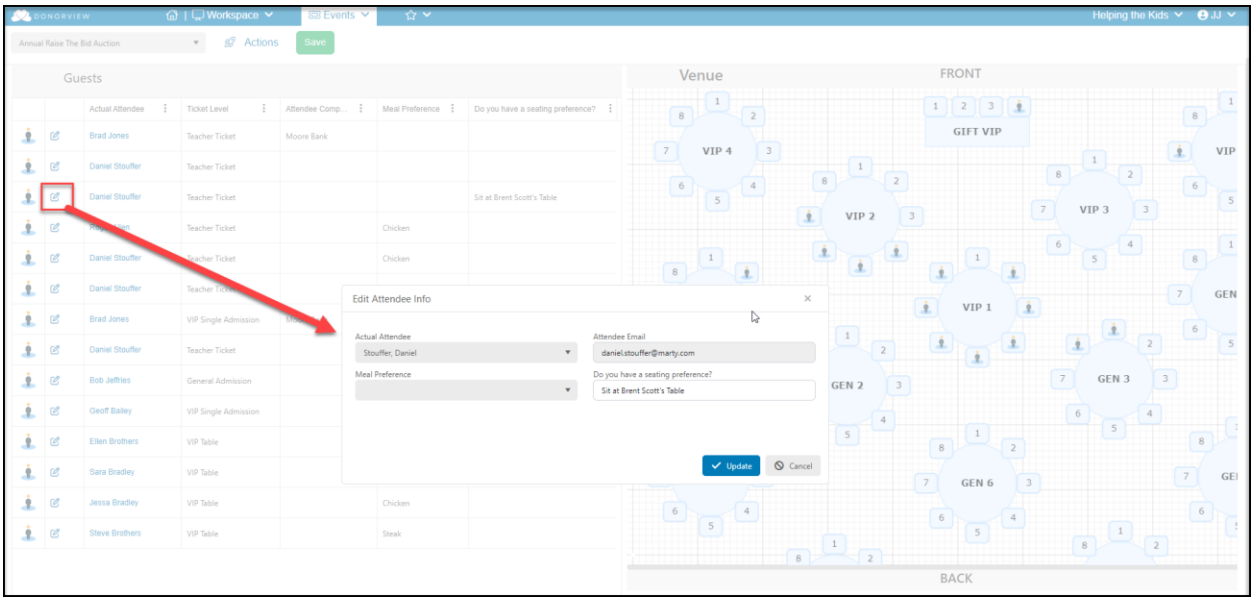


3. Update information on the Event Attendance grid using the edit icon on the right side of the row. You can learn more about the Event Attendance grid in this video: https://vimeo.com/728826049/8dfe9b27d3

4. Table Assignments

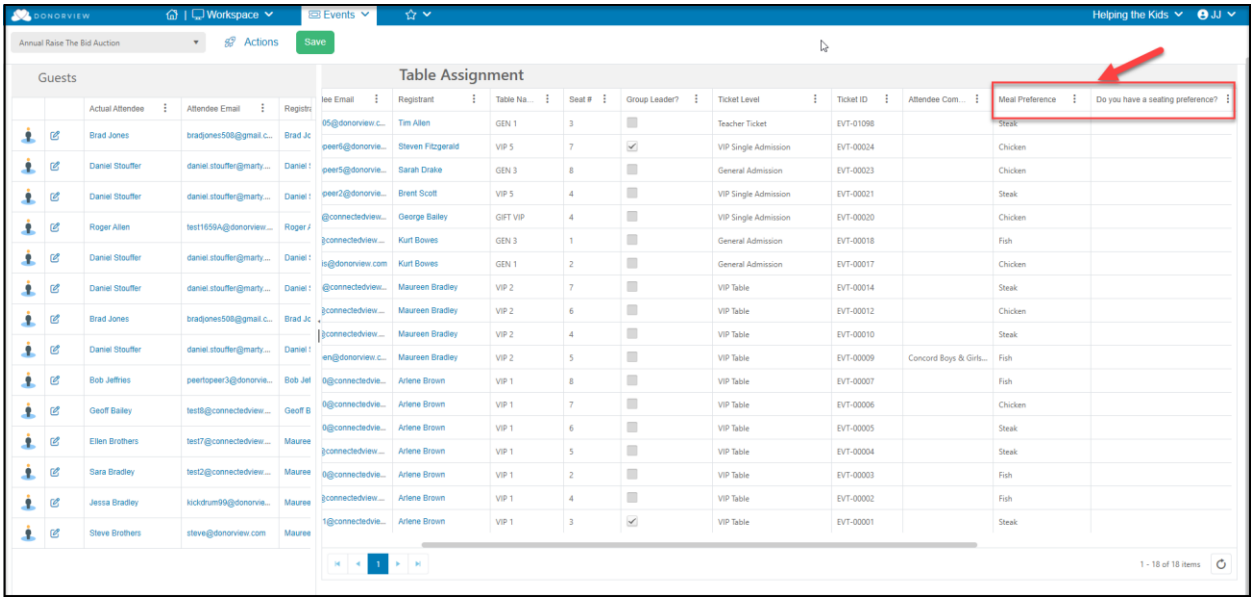
   a. You can build your venue map anytime in the Table Assignments page.

b. You can view attendee info questions for the guests who have not been seated yet in the Guests column. You can either stretch the grid or click on the edit icon to reveal the answers for a particular attendee.



c. For attendees who have been seated, using the Grid View, you can see their answers under Table Assignments.

d. These columns can be moved, filtered and turned on or off as desired.

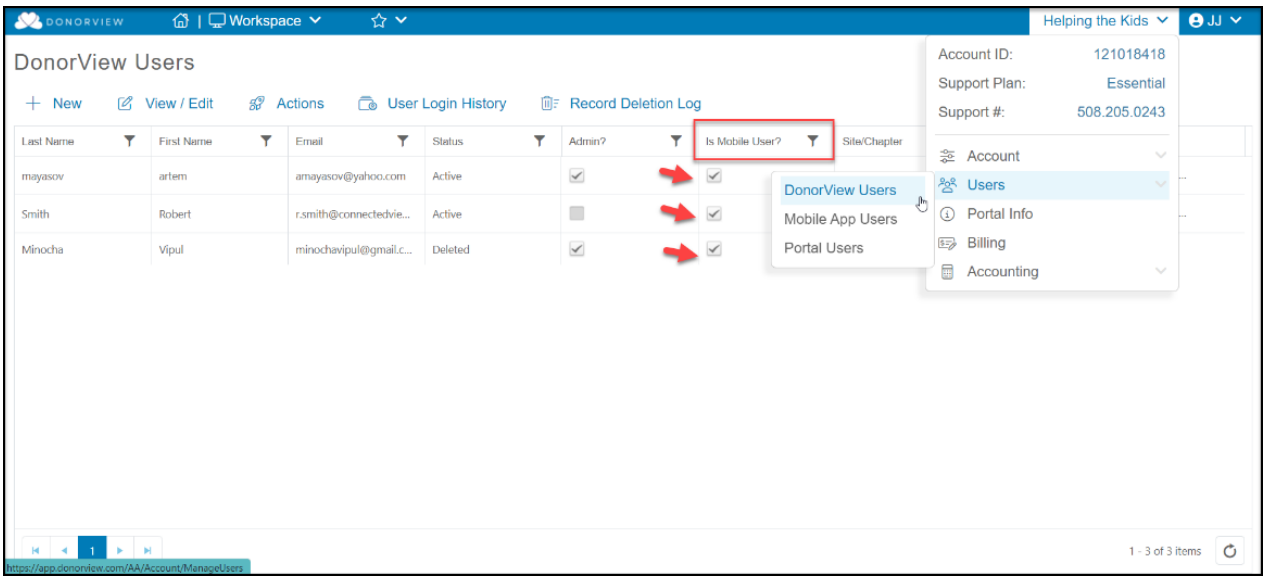


e. You can learn about using the table assignments feature in this video https://vimeo.com/741142781/7d79d8b591

5. You can resend tickets if necessary to individual registrants or to all registrants from the Events grid.
6. Creating Attendee Packets
    a. Organizing and creating attendee packets prior to the event can help expedite the check in process.
    b. Suggestions for items to provide the attendees include:
        i. Nametags for the attendees
        ii. A program
        iii. Table assignments
        iv. The name and email address used for their constituent record for creating a portal account (if necessary)
        v. Wi-fi login (if necessary)
    c. You can also mark packets to identify attendees that do not have a credit card on file if you are selling items at the event.

D. Volunteers

1. Create a schedule and assignments for your volunteers. You can create a volunteer event in DonorView and have volunteers sign up for specific shifts or activities if desired.
2. Ensure all staff and volunteers have been given mobile app access via the organization's user settings if you will be utilizing the app.
3. Provide necessary training for volunteers and staff who will be checking in attendees using the mobile app.



E. Venue review

1. Visit the venue to ensure there is sufficient wi-fi capability to support your devices including laptops, mobile phones, and iPads.
2. Create your equipment list based on where you will be set up for your different activities
    a. You may need things like extension cords for laptops and printers (if using).
    b. Ensure you bring the charging cords and a plug with a USB port to charge the swipers (if using). The swipers can only hold a charge for 4-6 hours.

IV. Hosting the Event

A. Set-Up

1. Equipment
    a. Ensure all your swipers are fully charged
    b. Test laptops, iPads and iPhones being used for check-in and check-out
2. Check In Area
    a. Set up welcome packages
    b. Set up swipers and sync with iPad/iPhones
    c. It is recommended to sync one swiper with just one iPad or iPhone and use them as a unit to prevent sync issues

B. Attendee Check-In

1. If using tickets and the scanner feature in the DV Connect app, station volunteers to scan tickets or look up attendees at check-in
2. Provide attendees with their welcome packages
3. Offer attendees the opportunity to scan their credit cards for faster checkout if you are selling items or collecting donations at the event

V. Check-out

1. If desired, you can also show guests who have left the event using the Check-Out column on the Event Attendance grid.
2. If you collected donations during the event, you could record them immediately by using the Payments feature on the mobile app. This does require swiping the credit card.
3. You can also record donations with a laptop by opening the applicable donation page and selecting the donor's name in the dropdown shown at the top of the page. If they have a credit card on file, you can enter the amount and select the card, or you can manually type in their card number.

4. Pledges can only be recorded using a donation page or manually entering a pledge into the software. The mobile app does not accept pledges.
5. Also, pledge payments can only be made in the software.

VI. Post Event

A. Collecting pledge payments

1. Attendees may leave early before they complete the check-out process. You can produce reports from the gifts grid or pledges grid to show any outstanding pledges.
2. Attendees with payments due can be contacted with a direct email, text, or by using the mail merge template letters.

B. Thanking attendees and sponsors

1. Your Event Attendance grid will show who actually attended your event.
2. You can send a text, direct email, or make an email list to let your attendees know your final numbers and thank them for making the event a success.
3. Your Event grid will identify your list of sponsors so you can contact them with their post-event thank you message.

C. Recording volunteer hours

1. If you did not set up automatic hours via a volunteer event, be sure to record the hours for your volunteers in DonorView.
2. Volunteers can also receive a special thank you for their service.

EVENT CHECKLIST

Planning Stage				
Activity	Responsible	Target Date	Completed Date	Notes
Establish goals for the event				
Form the event committee				
Choose the event theme				
Determine the event scope				
Create & distribute the schedule				
Other:				
Other:				
Promotion & Sales				
Activity	Responsible	Target Date	Completed Date	Notes
Determine sponsorship offerings				
Determine ticket pricing				
Determine add-ons (if any)				
Set up sponsorship tasks				
Create event page				
Identify attendee info questions				
Develop marketing strategy				
Solicit sponsorships				
Send invitations				
Promote event				
Track sales progress				
Other:				
Other:				
Pre-Event				
Activity	Responsible	Target Date	Completed Date	Notes
Set up event auto-reminders				
Order cc swipers				
Download DV Connect app				
Set up attendee communications				
Update event attendee information				
Finalize table assignments				
Create attendee packets				
Set up new users & mobile app				
Assign & schedule volunteers				
Train volunteers				
Verify wi-fi & cell service at venue				
Create equipment list				
Other:				
Other:				

EVENT CHECKLIST (Continued)

Hosting The Event				
Activity	Responsible	Target Date	Completed Date	Notes
Charge swipers				
Test laptops, iPads & iPhones				
Set up check in/check out area				
Record donations/pledges				
Other:				
Other:				
Post Event				
Activity	Responsible	Target Date	Completed Date	Notes
Collect remaining payments				
Send attendee thank yous				
Send sponsor thank yous				
Record volunteer hours				
Other:				
Other:				