



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

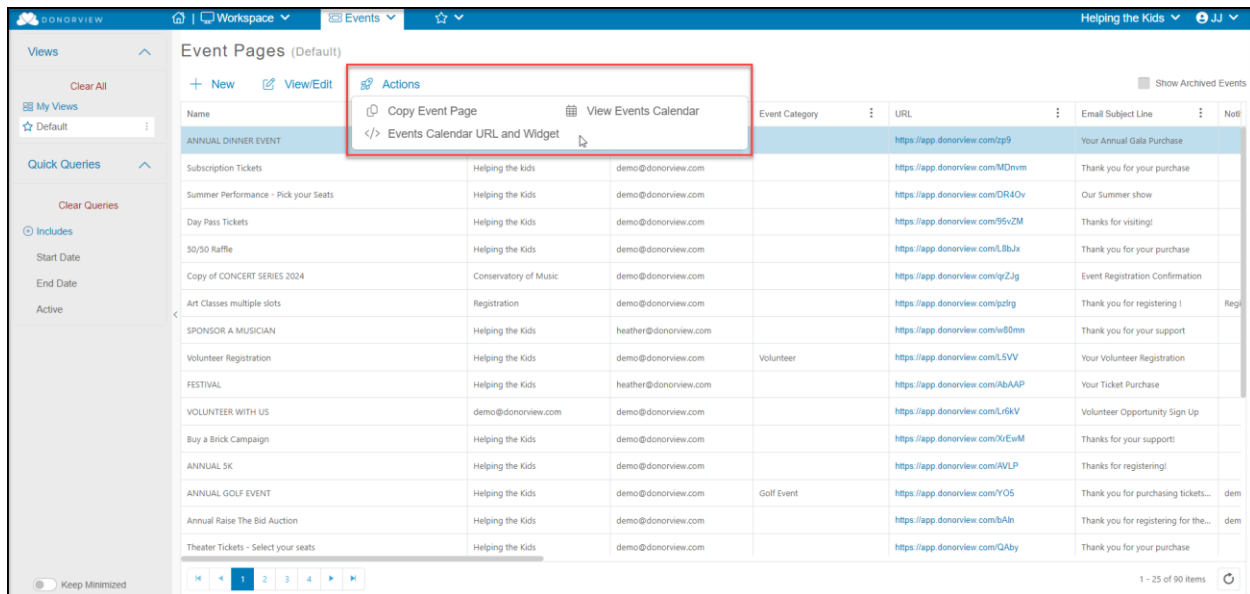
1. Determine what sponsorship and ticket levels you will be offering for your event.
2. For sponsorships, you can set up your sponsorships, link them to event levels, and create a list of tasks using the Sponsorships feature in the Fundraising Module.
 - a. This will allow you to create tasks and follow-ups 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 wine 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.

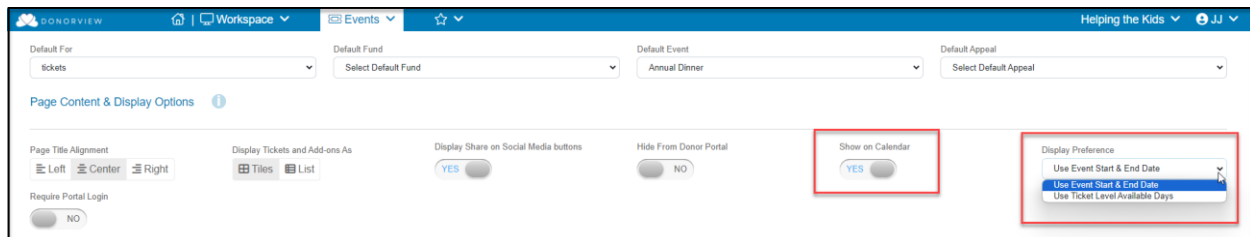
- d. The QR codes that are generated on each page for inclusion in social media, advertising, brochures, posters, and other invitations.
- e. Text to URL codes identified for each page can also be promoted and included in marketing.
- f. Direct text messaging allows you to send personalized texts to 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.



The screenshot shows the 'Event Pages (Default)' grid in the DONORVIEW interface. The 'Actions' menu is open for the 'ANNUAL DINNER EVENT' row, showing three options: 'Copy Event Page', 'View Events Calendar', and 'Events Calendar URL and Widget'. The grid lists various events with columns for Name, Event Category, URL, Email Subject Line, and a 'Noti' column.

Name	Event Category	URL	Email Subject Line	Noti
ANNUAL DINNER EVENT		https://app.donorview.com/zg9	Your Annual Gala Purchase	
Subscription Tickets	Helping the Kids	https://app.donorview.com/MDnm	Thank you for your purchase	
Summer Performance - Pick your Seats	Helping the Kids	https://app.donorview.com/DRAOv	Our Summer show	
Day Pass Tickets	Helping the Kids	https://app.donorview.com/95vZM	Thanks for visiting!	
50/50 Raffle	Helping the Kids	https://app.donorview.com/LBjx	Thank you for your purchase	
Copy of CONCERT SERIES 2024	Conservatory of Music	https://app.donorview.com/qZJg	Event Registration Confirmation	
Art Classes multiple slots	Registration	https://app.donorview.com/pztrg	Thank you for registering!	Regi
SPONSOR A MUSICIAN	Helping the Kids	https://app.donorview.com/wB0mm	Thank you for your support	
Volunteer Registration	Helping the Kids	https://app.donorview.com/L5VV	Your Volunteer Registration	
FESTIVAL	Helping the Kids	https://app.donorview.com/AbAAP	Your Ticket Purchase	
VOLUNTEER WITH US	demo@donorview.com	https://app.donorview.com/Lu6kV	Volunteer Opportunity Sign Up	
Buy a Brick Campaign	Helping the Kids	https://app.donorview.com/XEwM	Thanks for your support!	
ANNUAL 5K	Helping the Kids	https://app.donorview.com/AVLP	Thanks for registering!	
ANNUAL GOLF EVENT	Helping the Kids	https://app.donorview.com/YO5	Thank you for purchasing tickets...	dem
Annual Raise The Bid Auction	Helping the Kids	https://app.donorview.com/bAIn	Thank you for registering for the...	dem
Theater Tickets - Select your seats	Helping the Kids	https://app.donorview.com/QAby	Thank you for your purchase	

- 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.



The screenshot shows the 'Page Content & Display Options' section of the DONORVIEW interface. The 'Show on Calendar' toggle is set to 'YES'. The 'Display Preference' dropdown menu is open, showing three options: 'Use Event Start & End Date', 'Use Event Start & End Date', and 'Use Ticket Level Available Days'.

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

Helping the Kids Brad Jones

Ticket Assignments

* = required field. Please provide First Name, Last Name and Email Address for the ticket to be assigned.

Ticket 1 Hole In One (Ace) Package

First Name: Brad Last Name: Jones Email: bradjones508@gmail.com

T Shirt Size: XL Golf Cart drivers please provide your Drivers License #: BU500-78934234 Meal Preference: Steak Are you bringing a guest to dinner? Yes

What is your team name? The Jones Family What is your desired tee time? 2:00 PM

Ticket 2 Hole In One (Ace) Package

First Name: Christine Last Name: Jones Email: christine.jones@donorview.com

T Shirt Size: L Golf Cart drivers please provide your Drivers License #: CJK600-235980 Meal Preference: Fish Are you bringing a guest to dinner? No

What is your team name? The Jones Family What is your desired tee time? 2:00 PM

- Note that only the ticket purchaser has access to this information.
- For ticket or sponsorship purchases made by a company, the primary contact will login to manage the guests.
- You can find or designate the primary contact for a company on their profile page at the bottom of the page.

Company Profile Helping the Kids JJ

Search Contact

Moore Bank

Update Profile Picture

Profile Report

Address: 4 Riverside Ave Medford, MA 02155 United States show on map

Website: Launch

Phone: Work - 5082050243 Fax - 5082324600

Constituent ID#: CV-02592

Member ID#: 000160

Company Contacts

First Name	Last Name	Company	Title	E-Mail	Primary 1	Primary 2	Invoice	Inactive	Phone
John	Teoro	Moore Bank	Facilities Consultant	johedwsmi@donorview...	☐	☐	☒	☐	
Kathe	Kruse	Moore Bank	CFO	kathe.kruse@donorvie...	☐	☒	☐	☐	860-456-3484
Karen	Ames	Moore Bank	Marketing Manager	kbenvenuto@donorvie...	☐	☐	☐	☐	
James	Jones	Moore Bank	Marketing Intern	james.jones@donorvie...	☐	☐	☐	☒	5082050243
Brad	Jones	Moore Bank		bradjones508@gmail.c...	☒	☐	☐	☐	5282324600

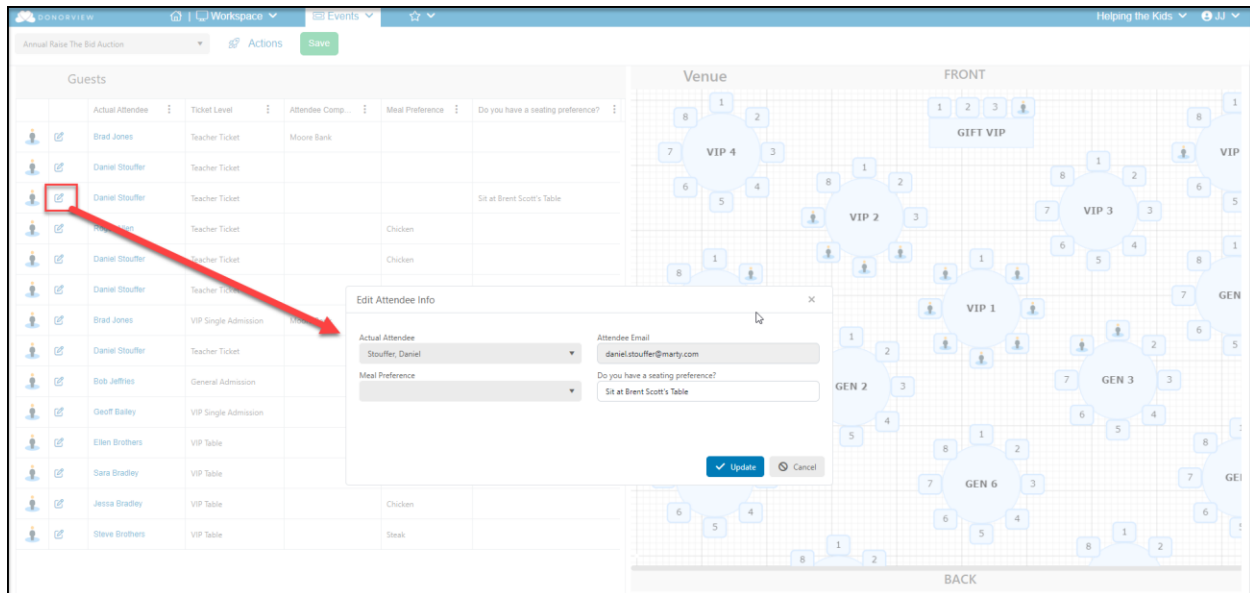
1 - 5 of 5 items

Website: <http://www.donorview.com> Blog: <http://www.donorview.com> Instagram: <http://www.instagram.com>

Facebook: <http://www.facebook.com> Twitter: <http://www.twitter.com> LinkedIn: <http://www.linkedin.com>

- 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>
- Table Assignments
 - 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.

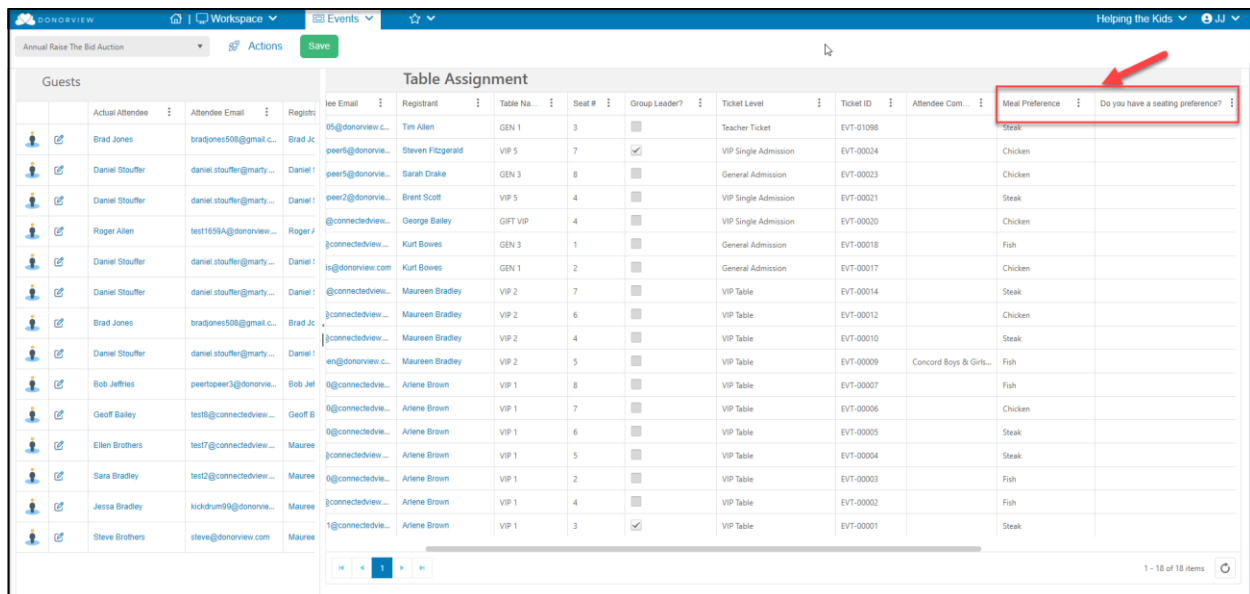


The screenshot shows the DONORVIEW interface with the 'Guests' column on the left and a 'Venue' map on the right. A red arrow points from the 'Edit' icon in the 'Guests' column to the 'Edit Attendee Info' modal window. The modal window displays the following information:

- Actual Attendee: Stouffer, Daniel
- Attendee Email: danielstouffer@marty.com
- Meal Preference: Chicken
- Do you have a seating preference?: Sit at Brent Scott's Table

The 'Venue' map shows a grid of tables labeled VIP 1, VIP 2, VIP 3, VIP 4, GEN 1, GEN 2, GEN 3, GEN 4, GEN 5, GEN 6, and GIFT VIP. The 'Guests' column lists attendees with their ticket levels, meal preferences, and seating preferences.

- 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.



The screenshot shows the DONORVIEW interface with the 'Table Assignment' column on the left and a 'Table Assignment' grid on the right. A red arrow points to the 'Meal Preference' and 'Do you have a seating preference?' columns. The 'Table Assignment' grid displays the following information:

Actual Attendee	Attendee Email	Registrant	Table No.	Seat #	Group Leader?	Ticket Level	Ticket ID	Attendee Com.	Meal Preference	Do you have a seating preference?
Brad Jones	bradjones508@gmail.com	Brad Jones	GEN 1	3		Teacher Ticket	EVT-01098		Steak	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	VIP 5	7		VIP Single Admission	EVT-00004		Chicken	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	GEN 3	8		General Admission	EVT-00023		Chicken	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	VIP 5	4		VIP Single Admission	EVT-00021		Steak	
Roger Allen	test1659A@donorview.com	Roger Allen	GIFT VIP	4		VIP Single Admission	EVT-00020		Chicken	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	GEN 3	1		General Admission	EVT-00018		Fish	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	GEN 1	2		General Admission	EVT-00017		Chicken	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	VIP 2	7		VIP Table	EVT-00014		Steak	
Brad Jones	bradjones508@gmail.com	Brad Jones	VIP 2	6		VIP Table	EVT-00012		Chicken	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	VIP 2	4		VIP Table	EVT-00010		Steak	
Daniel Stouffer	danielstouffer@marty.com	Daniel Stouffer	VIP 2	5		VIP Table	EVT-00009	Concord Boys & Girls...	Fish	
Bob Jeffries	peer2peer3@donorview.com	Bob Jeffries	VIP 1	8		VIP Table	EVT-00007		Fish	
Geoff Bailey	test18@connectedview.com	Geoff Bailey	VIP 1	7		VIP Table	EVT-00006		Chicken	
Ellen Brothers	test7@connectedview.com	Maureen	VIP 1	6		VIP Table	EVT-00005		Steak	
Sara Bradley	test2@connectedview.com	Maureen	VIP 1	5		VIP Table	EVT-00004		Steak	
Jessa Bradley	kickdum9@donorview.com	Maureen	VIP 1	2		VIP Table	EVT-00003		Fish	
Steve Brothers	steve@donorview.com	Maureen	VIP 1	4		VIP Table	EVT-00002		Fish	
			VIP 1	3		VIP Table	EVT-00001		Steak	

- 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)

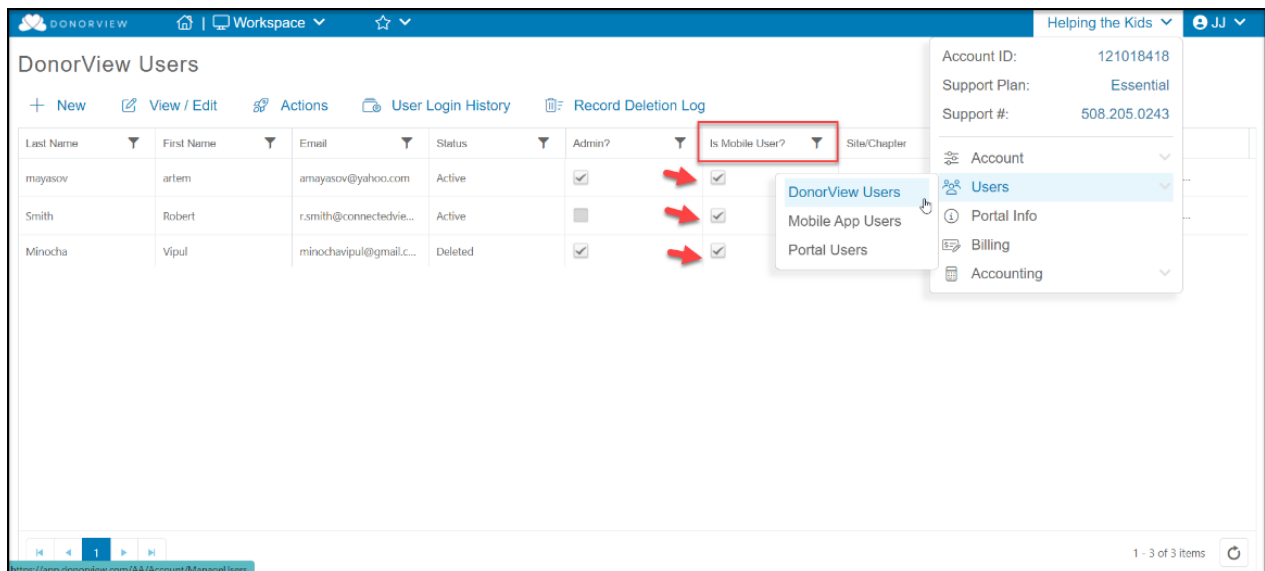
c. You can also mark packets to identify attendees that do not have a credit card on file if you are selling items at the event.

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.



DonorView Users

+ New View / Edit Actions User Login History Record Deletion Log

Last Name	First Name	Email	Status	Admin?	Is Mobile User?	Site/Chapter
mayasov	artem	amayasov@yahoo.com	Active	☒	☒	
Smith	Robert	r.smith@connectedvie...	Active	☐	☒	
Minocha	Vipul	minochavipul@gmail.c...	Deleted	☒	☒	

Account ID: 121018418
Support Plan: Essential
Support #: 508.205.0243

Account
Users
Portal Info
Billing
Accounting

1 - 3 of 3 items

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:				