

Building and Maintaining Non-Profit Client Relationships Beyond the Event

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Event Planner & Non-Profit Client Strategic Partners Beyond the Event

- A Case in Point - The unique partnership developed to enhance a statewide fundraising events program
 - Review of Client Needs



Event Planner & Non-Profit Client Strategic Partners Beyond the Event

- A Case in Point - The unique partnership developed to enhance a statewide fundraising events program
 - Review of Planner Opportunities



Event Planner & Non-Profit Client Strategic Partners Beyond the Event

- A Case in Point - The unique partnership developed to enhance a statewide fundraising events program
 - How it worked



Today's Focus

- Understand and Design an Attendee Experience that is more than "Night Of"
- Build a Strategic, Thorough, and Successful Event Plan & Partnership
 - Pre-Event
 - During Event
 - Post-Event
- Build the Experience with the Attendee and the Organization that lasts Beyond the Event



Understanding & Designing the RIGHT Event

- Non-Profit Fundraising Event Success
 - Multiple Avenues of Fundraising Events
 - Mass Market Events
 - *Runs, Walks, Community-wide programs*
 - Distinguished Events
 - *Galas, Golf, Luncheons, Sponsored events*



Understanding & Designing the RIGHT Event

- Non-Profit Fundraising Event Success
 - Defining Outcomes & Success
 - End Goal = Major Gift / Donor Development
 - Donor Engagement



Understanding & Designing the RIGHT Event

- Value of Planner Relationship
 - Assess the Goals & Objectives of Organization and Event
 - Determine the Right Event - Objectively and Realistically
 - Create a Comprehensive Plan
 - Keep the Organization's Mission as Focus During Planning
 - Creative and Professional Approach to Promoting Organization
 - Create Continuity and Elevate Guest Interaction/Perceptions



Build a Strategic, Thorough, and Successful Event Plan & Partnership

- Pre - Event
- During Event
- Post - Event



PRE-EVENT

- **COMMITTEES**
 - Clear expectations, commitments and education
 - Keep focused on the goal - revenue
- **PLANNING & LOGISTICS**
 - Identify and manage the task list and timeline
 - Staff partner should be the hub, collection point
- **DONOR & VOLUNTEER DEVELOPMENT**
 - Before engaging volunteers, have a plan
 - Review sponsor and donor requests and make a plan



DURING EVENT

- **COMMITTEES**
 - Review roles and expectations for event
 - Celebrate, recognize and honor committee members
- **PLANNING & LOGISTICS**
 - Review entire plan, from the guest experience with all those involved – for a seamless flow from start to finish
 - Educate every one on roles and expectations
- **MISSION INTEGRATION**
- **DONOR & VOLUNTEER DEVELOPMENT**
 - Use your Organization's leadership and lead volunteers
 - Recognize and honor your donors and sponsors



POST-EVENT

- **COMMITTEES**
 - Plan a debrief – ask for their feedback and listen
 - Thank them and ask them to stay involved
- **PLANNING & LOGISTICS**
 - Get all final details & review budgets
 - Input information to Organization's data systems for tracking
- **DONOR & VOLUNTEER DEVELOPMENT**
 - Opportunity to thank and provide impact statements
 - Review follow up needs and build in touch points throughout the year, not only event-related



STRATEGIC QUESTIONS – DO YOU ASK THEM?

A CRITICAL TOOL

This tool is available online with the education documents for your reference.



You can download from
the ISES website

Make it your own



Strategic Questions to Answer Before Planning an Event (and to revisit each year of an existing event)

What is the purpose of the event?

- Fame (promotion)
- Fortune (revenue)
- Friends (members/donors)
- Fun (celebratory)

More importantly, do your directors and key stakeholders know the purpose?

Who to Ask?

- Identify ALL the key stakeholders, who all is involved?
- What are their roles and expectations?
- Who is really making the decisions?

Understand, develop and manage partnerships with all stakeholders.

How to be a good partner?

- Help shape the vision, then deliver the experience
- Understand the realities of balancing vision, expectations and budgets
- Confirm you have a collective understanding of success
- Incorporate all team members in overall vision --keep everyone informed

What to Ask?

- What are you trying to achieve?
- What is the overall organizational strategy? Does an event fit/make sense?
- What is the experience you want your guests to have?
- If something is donated or in-kind, does it make sense with your plan?
- What is the action you want their guests to take?
- Who are you trying to reach? Who needs to be in the room?
- What is the message?
- How will success be defined?
- What is the post-event strategy?

How does it fit into annual giving strategies and major gift prospect development?

- Does the return on investment make sense for the amount of staff resources used?
- Is there a stewardship plan beyond the event?
- Does the event detract from pure donation dollars? Do guests assume their event \$\$\$ is their annual gift? And if so, is it enough?
- If the event goes away, have you done enough to keep the donors and volunteers associated to the organization beyond the event?

Remember - For Every Event:

- Ask the questions
- Listen to the responses
- Ask more questions
- Define success
- Shape the vision (based on defined strategies)
- Deliver the RIGHT experience
- Measure the Success

Questions? Comments...



THANK YOU!

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Be Strategic.
Be Supportive.
Be Focused.
Beyond the Party.

