TeamRaiser Event Planning Workbook

Introduction

In this workbook, you'll find tools to help you plan your next team fundraising event. These exercises will allow you to think critically about your event, assess your current performance, and set goals and communication schedules for next year's event.

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More Information

To access the TeamRaiser Workshop Summit Presentation slides, please visit the Summit 2009 section of the Convio Client Community:

http://community.customer.convio.com/community/summit/summit2009

To find out what Convio services are available to you in planning your next event, please contact your Convio Account Manager.

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TeamRaiser Event Workbook

General Information

Event/Series Name _____

Years in Existence _____

Type of Event _____

What is the purpose of your event?

How does your event help you support your organization's mission?

What is unique about your event? What sets you apart?

Who is the average participant in your event?

Who is the average donor to your event?

What is your vision for your event in 5 years? 10 years? 25 years?

Who do you rely on to manage your event? Volunteers? Staff? Consultants?

Current Event Data

Please answer the following questions below regarding your last fundraising event. The goal of this exercise is to get you thinking about what worked well last year, and what you might try doing differently this year.

Event Date:
Registration Launch Date:

When was the peak of heaviest registration activity? Why?

When was the lowest point of registration activity? Why?

Was there a registration fee? How much?

Was there a Fundraising Minimum? How much? What percentage met the minimum/goal?

Did you provide any incentives for fundraising? Were they successful?

What channels did you use to promote your event?

What channels did people use to get to your event website?

How many emails did your organization send to promote the event?

Did you segment emails to participants? Donors? Other groups?

Did you perform a post-event survey? What did it reveal?

Metrics and Goals

The table below lays out a number of important event metrics - if possible, look up these metrics for your last two (or more) events and calculate the percentage of growth from 2008 to 2009. Consider these numbers, any new tactics you plan to execute, and any impending environmental factors and trends and determine your goals for 2010.

Metric	2008	2009	%Growth	2010 Goal
Fundraising Goal				
Registration Goal				
Days from launch to event				
Participants Registered Online				
Participants Registered Offline				
Total Participants Registered				
How many attended event (if known)				
Online Registration Fees				
Offline Registration Fees				
Total Registration Fees				
# of Participants who fundraised				
# of Participants who did not fundraise				
Online Gift Amount Raised				
Offline Gift Amount Raised				
Total Amount Raised				
Avg Online Gift Amount				
Avg Offline Gift Amount				
Avg Gift Amount				
# of Online Gifts				
# of Offline Gifts				
Total # of gifts				
Avg # of Gifts/Online Participant				
Avg # of Gifts/Offline Participant				
Avg # of Gifts/Participant				
# of Teams				
# of Team Gifts				
Total Amount of Team Gifts				
Avg Team Gift Amount				
# of Event Gifts				
Total Amount of Event Gifts				
Avg Event Gift Amount				
# of Participants who donated				
# of Participants who sent email				
# of PC emails sent				
Avg # of e-mails/participant				
# of Corporate Sponsors				
Amount Raised in Sponsorships				

Event Planning Considerations Checklist

The list below highlights several areas to consider when planning your event. Feel free to take notes below and check each item off your list as you work it in to your event plan.

Complete?

Identify Growth Trends: Look at your metrics from past years to see which goals were reasonable and which goals need to be adjusted.

Determine Event Timeline: What's the right timeline for your event? Some events choose to open registration for next year's event at the close of this year's event. For others, this may not be appropriate. What works for you? Take into account changes you want to make to your website, branding, locale, or other dependent factors.

Set your goals: Are you focused on increasing average gift size? Team size? Registration numbers? What's the best tack for you? How do you plan to reach these goals?

Re-launch your TeamRaiser: Contact Convio to see what new features might be available for the next event.

Consider a Request for Information (RFI) Survey: Is registering for your event a big commitment (i.e. large fundraising commitment or training commitment)? Consider a form to capture information about interested constituents, and foster the relationship through registration.

Develop a Marketing Plan: How do you measure if your marketing is working? What channels will you employ? Are there new technologies to consider (Mobile App, Facebook, Twitter, etc)?

Develop a Communication Plan: What can you automate using blueprints, coaching e-mails, autoresponders? Are you segmenting your audience? How often do you e-mail participants? Do you communicate via other methods like phone or mail?

Consider an incentive program: Can you offer an early-bird discount to ramp up registration? Do you have a partner willing to donate prizes to use as incentives (airline tickets, spa, etc)? How will you define incentive levels? How can you coach participants along the way? Consider using the TeamRaiser Milestone feature.

Promote Teams: Do you have a plan to reach out to previous team captains? Will you offer special training or meetings for team captains? Are you garnering corporate participation? If not, why not?

Consider your Registration Fee: Do you have a registration fee? Do any changes need to be made? Are you using Donation Levels? Do people donate in addition to their registration fee? How much? Consider using the "Personal Gift" fundraising icon to honor participants who donate.

Offer Re-registration opportunities: How do you support team captains from one year to the next? Do you offer re-registration opportunities at the current event? Do you offer discounts, or recognize early registrants?

Determine a strategy for offline Registrations/Gifts: What needs or strategies do you have around offline data? Do you have or need a third party data entry vendor? Where does the offline data live?

2010 Plan

Use this page to outline your plans for your next event. Use the following "Communication Plan" tab to outline your e-mail schedule for the event. This worksheet is intended as a guide - feel free to add new items to suit your unique event plan.

Event Date	
Registration Launch Date	
Weeks/Days from Launch to Event	
Participation Goal	
Fundraising Goal	
Registration Fee Amount	
Participant Fundraising Minimum	
Participant Fundraising Goal (suggested)	

Registration Incentives (i.e. Early Bird Discount)

Fundraising Incentives (i.e. VIP prize)

Number/Frequency of Event Emails in Plan

Registration/Re-registration Opportunties

Marketing Channels

Feedback Opportunities

New Tactics

Example Email Campaign: Event 2010

Message	Example: Re-Register Your Team	Example: Registration is Now Available	Event Date 11/15/2010
Audience	Previous Team Captains	Entire Housefile	
Weeks-to-event	52	50	
Send Date	11/15/2009	12/1/2009	
Message/Purpose	Allow Team Captains to set up Teams & invite team members to re-join/re-register	Announce registration for 2010 event: advertise "early bird" registration discounts	
Call-to-action	Start a Team	Register	
Audience Segments	2009 Team Captains/2008 Team Captains	Previous Team Captains/Previous Participants/Everyone else	
Conditional Content	2009: Keep your momentum, re-claim your team/2008: We missed you, start a team	Team Captains: Start Team/Previous Participants: Re-register/Everyone Else: Register	
Performance			
Open Rate			
Click-Through Rate			
Conversion/Action Rate			
Opt Out Rate			
Notes			

Message			
Audience			
Weeks-to-event			
Send Date			
Message/Purpose			
Call-to-action			
Audience Segments			
Conditional Content			
Performance			
Open Rate			
Click-Through Rate			
Conversion/Action Rate			
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