

TRANSITIONING YOUR EVENT

For many nonprofit organizations, events are an important way to raise funds, gather close donors, and educate the community in a unique way. Limitations for in-person gatherings presents challenges for organizations that planned to hold events, particularly in spring and summer. This document offers a process to clarify your event objectives and develop a plan to achieve them in this distanced period.

First, resist the urge to jump straight into the logistics. Before sending out a cancellation notice or purchasing new virtual event software, **nonprofits should take advantage of this moment to review and assess the purpose and performance of their key events.** This helps clarify the best event strategy to achieve your objectives *this year*, and to identify opportunities to enhance these high-capacity activities well into the future.

Executive Summary and Key Considerations

<p>STEP 1: ASSESS</p> <p>Evaluating Purpose and Impact: <i>In a typical year, what were the stated goals, benefits, and motivations for the event?</i></p>	<p>Before you ask “what now?,” recall what the event was intended to achieve. Were you raising funds for a certain cause? Celebrating donors at a certain level? Educating the public? Or a combination? Taking the time to understand what goals your event was going to advance, and where you were at in the planning stage will inform and elevate your transition plans moving forward.</p> <p>Pro Tip: <i>Check out the Event Audit Checklist to clarify event objectives. Share it with your volunteers to come to a collective decision!</i></p>
<p>STEP 2: DECIDE</p> <p>Transitioning Insights Into Action: <i>Develop an engaging strategy or program that achieves event objectives.</i></p>	<p>“To cancel or not to cancel?” is <i>not</i> the question. Your organization has options, and CCS discourages wholesale cancellation of event fundraising plans. Your team may choose to postpone or make your event virtual. You can also redistribute staff efforts to build alternative strategies that advance the goals you identified in the assessment.</p> <p>Pro Tip: <i>Make your decision active. If it doesn’t make sense to continue working toward Plan A, what’s Plan B that advances your objectives? This active choice will make your next step a bit easier.</i></p>
<p>STEP 3: COMMUNICATE</p> <p>Keeping Constituents Close: <i>Your event plans have changed. Informing engaged audiences will keep them close and offer relationship-building opportunities.</i></p>	<p>Stakeholders are interested in hearing from the nonprofits they support. Developing a tiered communications plan that prioritizes event volunteers, sponsors, and major prospective donors can support the notification of your event transition decision. Though the logistics of your plan is important, incorporating impact-oriented updates about how your organization or cause is faring and how supporters can help will be strategic.</p> <p>Pro Tip: <i>Event fundraising opportunities are not lost! Nonprofits (even those who transitioned away from a virtual event) have retained sponsorships and ticket purchases through compelling, impact-oriented communication.</i></p>
<p>STEP 4: EXECUTE</p> <p>Resourcing Your Plan: <i>Once you determine what course of action makes the most sense for your organization, build your team – the staff and volunteer roles may look different from before you adjusted your original plans.</i></p>	<p>For an event planning team, this step may feel familiar. Develop the appropriate working group, action steps, and timeline to make the event a success! Though your plans have changed, you may not need to start from square one. Find ways to creatively repurpose the plans and speaking points you have already developed.</p> <p>Pro Tip: <i>Post-event, after following-up and thanking your supporters, take the time to evaluate the success of your revised plan by analyzing your performance: how well did we do at reaching our goals? What can we change next time to make our event more successful?</i></p>

STEP 1: ASSESS – EVENT AUDIT

PURPOSE AND IMPACT

In a typical year, what are the stated goals, benefits, and motivations for this event?

FUNDRAISING	
<p>Does this event produce irreplaceable funds for your program or organization?</p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> • What are the average funds raised? What is the breakdown of gift levels (average gift amount, largest gift amount, etc.)? • How are the funds raised (ticket/table sales, sponsorships, auction items, donations – direct mail, online, peer-to-peer, major gifts)? • What is the average ROI/net raised? • What do the funds support (annual operations, a specific program, etc.)? • Does that program / fund / beneficiary realize any other fundraising revenue during the year? 	
ENGAGEMENT	
<p>Who attends this event, and does your organization have another way to reach them?</p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> • What is the average number of attendees over the past three years? • Has attendance been increasing over the past three to five years? • Does the event attract close insiders, new faces, or both? • Is there an event planning committee? What are their usual roles and how often do they meet? • Does this event tend to be a pipeline for new volunteers and donors outside of the event itself? 	
EDUCATION	
<p>What important messaging does the event carry about your organization's mission, impact, and/or people? Through what vehicle?</p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> • Does this event serve as the primary vehicle for sharing updates, accomplishments, or impact of your organization throughout the community? • What proof points are available for how the event increases the attendees' understanding of the organization's mission, work, accomplishments, etc. following the event? 	

S T E W A R D S H I P	
<p>How does this event serve as a vehicle for donor stewardship? What other platforms are available to accomplish that recognition?</p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> • Are top donors, board members, or other key constituents honored during the event? • Is there an event program recognizing supporters of the organization/event? • What other platforms are utilized or available (outside of the event) to highlight these important donors/volunteers/board members/sponsors? 	
A D D I T I O N A L B E N E F I T S	
<p>What other key benefits are an outcome of this event?</p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> • Does the event result in improved/updated contact data? • Does the event result in press/media attention? • Does the event result in increased volunteer engagement? 	

PLANNING

What planning has already taken place? How many resources are dedicated to this event?

S P O N S O R S / D O N O R S / T I C K E T S A L E S	
<p>Have you already raised funds or secured commitments for this event?</p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> • What fundraising actions have already taken place? • How much has already been raised toward this event? • How many sponsors have been confirmed and for what amount? • How many tickets have been sold? Tables? 	
L O G I S T I C S	
<p>What logistics or contracts are already committed? What are the options and risks associated with changing your plans?</p> <ul style="list-style-type: none"> • What contracts have been signed and what invoices have been paid? • What are the options for moving forward (full or partial refunds, postponed events, new contract for next year's event)? • Have any communications or other promotions already been circulated? 	
S T A F F	
<p>What staff are still available for event planning – in past or altered format?</p> <p><i>Consider:</i></p> <ul style="list-style-type: none"> • How much staff time has already been put into this event? How much more is needed? • Do you still have the budget and staff bandwidth to move forward with the event in its current format? • Has the event committee been assembled? What have they completed to date? 	

TIMING

What timing considerations will make our decision for us?

EVENT CALENDAR	
<ul style="list-style-type: none"> • Does the date fall within the most up-to-date shelter-in-place restrictions for your city/state? • How many guests usually attend the event? How does this compare to capacities outlined in current social gathering limitations? • How many other events does the organization typically hold each year? • Is there an opportunity to combine this event with a future event? What challenges would present from that option? 	

STEP 2: DECIDE – ACTION PLAN

TRANSLATING INSIGHTS INTO ACTION

Considering the responses to the above guiding questions, what's the potential impact (both the fall-out and the benefit) if we postponed? Transitioned to an online event? Accomplished the event objectives through other methods? What cost savings would we gain? What funds would be sacrificed? What event benefits would be altered?

CANCEL	POSTPONE	VIRTUAL EVENT	ALTERNATIVE STRATEGIES
<ul style="list-style-type: none"> • Avoid wholesale cancellations of fundraising plans. • If it's not possible to postpone or conduct a virtual event (due to staff resources, timing, budget), consider other alternative avenues of engagement. 	<ul style="list-style-type: none"> • If the event must be held in-person, carefully consider the date - don't try to outguess the pandemic. • Determine how a delayed event will affect your overall fundraising program. • Communicate the new plans as soon as possible. • What activity can the org undertake in the meantime? 	<ul style="list-style-type: none"> • Consider the pros and cons of a virtual event: Pros – cost-effective, lots of flexibility, seamless data collection; Cons – less personal touch, fewer incentives, harder to stand out. • Explore the best software options: Email Software – ConvertKit; Live Stream – Facebook live, Zoom, Google Hangouts, Skype; Video – YouTube, Vidyard, Wistia; Graphic Design – Canva, Easl, Snappa, Adobe Spark; Fundraising Software – One Cause. 	<ul style="list-style-type: none"> • Leverage technology now (online event) with a planned in-person component down the road (thank you reception, etc.). • Conduct a small in-person event with virtual attendees. • Craft a plan for customized outreach - major gift fundraising plan, 1:1 virtual visits or conference calls, webinar/panel discussion, small group online gatherings.

STEP 3: COMMUNICATE – MESSAGING & PROMOTIONS

- **Over-Communicate.** Regardless of your go-forward plan, maintain communication with stakeholders – practice physical distancing, not social distancing. Ramp up your typical outreach. Now is a vital time to keep event invitees engaged and informed.
 - **Rethink Your Event Name:** Acknowledge a virtual event will not be the same gathering – consider renaming your event to underscore this (I.e., “The Pajama Ball: A Night of Giving in Your PJs”).
 - **Facilitate Connections:** Consider incorporating a live Q&A session and/or allow an online “chat” function – now more than ever, people want to connect with each other. Providing access to key executives or thought leaders can help keep your constituents connected to and excited about your organization’s work.
 - **Generate Excitement:** Display the event fundraising goal thermometer and donor wall live. Brainstorm new recognition levels and benefits for virtual event donors.
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STEP 4: EXECUTE – STRATEGY IMPLEMENTATION

- **Think Outside of the Box.** Find out how [here](#).
- **Turn Ticket Refunds Into Donations:** If you do cancel or postpone the event entirely, don’t assume you need to automatically give out refunds – allow attendees the option to donate the ticket fee (partial refunds and vouchers for next year’s event work too!).
- **Secure Sponsorships, No Matter What:** Focus on recruiting and retaining your sponsors regardless of your final plan – get creative with future ways to fulfill sponsor benefits. Be straight forward with your sponsor. Let them know what challenge is impeding your event and invite them to partner with you to identify the solution. Many sponsors already have their commitment set aside in their annual budget. Possible fulfillment opportunities include:
 - Using banner overlays to show sponsor logos during the online event
 - Bringing a sponsor onto live feed to speak about their program during the online event
 - Sending guests a digital version of the print program so that sponsor ads and recognition can still be seen during the online event
 - Writing an article about partnership in an upcoming e-news
 - Highlighting them on social media channels
 - Acknowledging their sponsorship on your website outside of the event
 - Fulfilling agreed upon recognition at your next planned event
- **Provide Flexibility:** Take advantage of the virtual platform to maximize success – there’s no need to limit your event to just one day. For example, The Red Cross of Wisconsin swapped their annual dinner gala to a weeklong online event – over the course of the week, the event site will include daily updates and videos featuring its hero award winners (one per day), along with an online auction and other donation opportunities.
- **Expand Your Invitation List:** Re-think your invite list. If you are transitioning to virtual, cast a wider net and expand the invite list to everyone you for which you have an email on file. Or, cut the list to only include your top prospects and donors for a more intimate gathering (either in person, or virtual).
- **Carefully Consider Online Auctions:** Electronic bidding (such as BidPal) allows for an easy transition from auction-related events to an online platform. Electronic bidding has many advantages, including the ability to set “watch lists” on items that donors are interested in, as well as maximum bids. However, carefully consider the prizes – an all-expenses paid trip that only good for the next 6 months may not have the same appeal as before.
- **Get Creative with Contracts & Vendors:** If you’re locked in with original event planners, consider scaling down the event and holding a casual or small-scale reception thanking everyone for their reception and flexibility.
- **Treat Your Event Like a Giving Day:** Check out our best practices [here](#) and [here](#).