SERTOMA CLUB EVENT PLANNING GUIDE

SERTOMA

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INTRODUCTION

Club meetings, regional conventions, awards banquets, gala dinners, fundraisers, membership recruitment receptions, community fairs, charity walks. There is a myriad of events that your club may host, and each one presents their own set of needs and challenges.

Holding an event can be quite overwhelming, but with careful planning and organization, it can be one of the most successful ways to promote your club and your mission. You will begin by identifying your event goals and setting your budget. From there, you will work through the many steps of presenting a successful event, encompassing everything from choosing your event format and finding sponsors to effective marketing and building attendee engagement. With all these moving parts, it's easy to see how some planners get lost along the way!

This guide was designed with you, the Sertoma club, in mind. Its intention is not to tell you exactly what must be done step by step; rather, the guide is here to offer helpful suggestions for every phase of the planning process. While some tips will apply to your event, others may not. It is up to you to decide what's best for your specific event.

Don't forget: your Sertoma staff is here to help! For additional assistance, contact headquarters at infosertoma@sertomahq.org or (816) 333-8300.

Happy Planning!

You can find additional manuals, trainings and informational resources on this and other topics in our online Member Center at members.sertoma.org.

EVENT GOALS

SETTING GOALS

Before you can even begin to plan your event, you must have an understanding of its purpose. The most common way a club can achieve this is by setting precise goals.

According to a recent blog from event technology solution provider Eventbrite, many planners actually tend to be bad at goalsetting. They may choose unrealistic goals, leaving their team feeling unmotivated. Or perhaps the goals don't really speak to the intended purpose, which means that organizers don't achieve the wanted result at the conclusion of the event. Event Planners often see sheer attendance numbers as the goal, but there are usually other metrics of success. Other planners may even set goals that are too vague to actually be measurably successful.

Another pitfall that some planners face is not understanding the difference between goals and objectives. While many use these terms interchangeably, group management solutions provider Social Tables points out that they actually have two distinct meanings. Goals are specific and measurable expressions of the intended purpose, while objectives are the strategies and steps that help you meet your goals. In some cases, you might need to incorporate "mini-goals" and milestones along the way.

IDENTIFYING YOUR GOALS

Now that we have this basic foundation in place, we can begin to identify goals for our next club event. Keep in mind, goalsetting is basically the process of defining your purpose. What are you trying to achieve here? Is it a fundraiser for an organization your club supports, a community event to educate others about your mission, a social mixer to promote club membership or perhaps something else altogether? Whatever your intention, Social Tables recommends that you consider the following questions:

1. Why have the event?
2. Why invite attendees?
3. What should attendees learn?
4. How will you measure success?

Answers to these questions should be part of your club's overarching strategic plan. This ensures that your goals speak to your mission and brand. The questions should also address any

overall performance goals you have in place. Performance goals are a quantified way of measuring the "why" behind everything the club does. Social Table advises focusing on the things that you can control. For example, you can't control repeat attendance, they explain, but you can track the qualified leads, follow-ups and sales that occur as a result.

BE SMART

So how do we overcome these many challenges? Many planning teams follow the traditional SMART method of goalsetting. This system focuses on choosing targets that are specific, clear and measurable.

- **Specific:** Be as clear-cut as possible.
- **Measurable:** Make sure you will know when you're successful. Eventbrite recommends avoiding goals that have binary outcomes (e.g., yes/no, success/fail, etc.) and focusing on those that allow a range of possibilities.
- **Achievable:** Don't overcomplicate things. While far-fetched targets can be great for motivation, setting unrealistic goals can actually have the opposite effect.
- **Relevant:** Focus goals on what you're trying to achieve and nothing else.
- **Time-Bound:** Deadlines are important to keeping your team inspired, but you don't want to go too far into the future unless necessary.

Let's look an example from Eventbrite. We'll start with a very basic goal: *I want my event to be more successful.* How do we make it SMART? Consider the following evolution, where each step brings you closer to a realistic and focused goal.

- **Specific:** *I want my event to generate more revenue than last year.*
- **Measurable:** *I want my event to generate 100% more revenue than last year.*
- **Achievable:** *I want my event to generate 30% more revenue than last year.*
- **Relevant:** *I want my event to generate 30% more revenue from ticket sales.*
- **Time-Bound:** *I want my event to generate 30% more revenue from ticket sales in the next six months.*

MEASURING YOUR GOALS

Determining how you will measure your goals' progress can be a difficult decision. Coming up with a matrix for success isn't something that many of us do often. That's why we recommend thinking about common event-industry Key Performance Indicators (KPIs) such as:

- Net Performer/Promoter Score (NPS): This will look at the likeliness of your targeted stakeholder (e.g. attendee, sponsor, etc.) to recommend your organization and/or event. The NPS is often measured on a ten-point scale and divides attendees into

Promoters (scoring 9-10), Passives (7-8) or Detractors (6 or below). To calculate the NPS, follow this simple equation: (Number of Promoters — Number of Detractors) / (Number of Respondents) x 100.

- Satisfaction Measures: Consider an array of audiences here – attendees, speakers/presenter, volunteers, sponsors/advertisers, etc.
- Gross Revenue and/or Profit: Have you met your financial targets, whether it be before or after expenditures are taken into account?
- Registration Numbers: If attendee count matters to your club, this is where to look.
- Qualified Leads: This may come in the form of potential members, donors, sponsors, community partners, etc.

CONSIDER YOUR CLUB STRATEGY

Once you have your goals in place, it's time to think about those objectives that we mentioned earlier. Social Tables suggests that this be done through both the perspective of the planner and the attendee. These are, in fact, the two major audiences that have the biggest impact on how you will reach your intended aspirations.

Objectives for Sertoma clubs are most likely to focus around two types of measures – educational and social. With educational objectives, we consider what types of speakers, programs and content we need to put into place to reach our audience. Keep in mind, this can be as broad as community education or as specific as learning provided through your club's monthly meetings. Our social objectives are all about connection. These are the networking and interaction moments that may be either the sole focus of your event or a small part of a much larger one.

EVENT BUDGET

EVENT BUDGETING & ROI

With your goals in place, it's time to move on to your budget. You must make sure that your club has the financial resources necessary for your event to be successful. Even more than that, you need to ensure that your event is a good investment for your club. This centers upon the event's return on investment (ROI).

Event ROI = Value ÷ Cost

Tight fundraising budgets mean that organizations and boards need to properly allocate and carefully spend each dollar, explains The Bizzabo Blog, an expert content provider for event professionals. Every dollar spent on your event is a type of investment. That money is invested in hopes of reaching "favorable business outcomes," the blog maintains. This includes things like increased membership, more community sponsorships and higher event profits.

BUILDING OUT YOUR BUDGET

Most club event budgets are going to follow a very traditional model. You can build it in Excel (or similar spreadsheet software program) or within your club's accounting software platform. The budget should account for four main columns minimally:

1. Budget Item
2. Projected Expense
3. Actual Expense
4. Details/Notes (include all relevant information in this portion to help justify budget decisions and document event history)

However, before you even begin to complete your spreadsheet, you may want to do a little strategic planning first. The first step really consists of reviewing any required budget goals. Remember, the purpose of the budget isn't just about allocating how money is spent, Bizzabo Blog says; it's also about prioritizing monies toward the most valuable event elements.

How do we determine those elements? A good place to start can be the event's history (if applicable). Taking advantage of things like past data and historical documents can really help you save time and make sound decisions during the budgeting phase.

It is equally important to work with any event stakeholders that have financial oversight. This may be club leaders, volunteer members or vendors. Everyone involved needs to be on the same page. Otherwise, you can find your club in a situation where details are overlooked or miscommunicated to the point where it becomes a significant financial hardship.

EVENT EXPENSES

A significant portion of the budgeting process focuses on examining your event expenses. The Balance Small Business, an online content provider focused specifically on assisting small businesses, emphasizes just how important it is to think about your event expenses properly.

As you build out the budget, you are going work first with your projected expenses. These are the upfront projections you share with your leadership and planning team to prevent surprises

later on, The Balance notes. Actual expenses, which are totaled after the event, tell the true story of what your club is looking at in terms of profit. This is where you really see the value of all your foresight and planning.

Whether it's an in-person event or held virtually, expenses can take on many shapes and forms:

1. **Venue:** The venue is likely to be the biggest line item on your budget. It is important to communicate any event requirements and support needs as you choose your location (onsite) or event hosting platform (virtual). It is highly encouraged that your club consider several options as it not only gives you the best idea of what's out there, it may also give you a little bit of bargaining power.
2. **Rental Costs:** This is another component that can have significant implications for both onsite and virtual events. For those events held in person, rental costs will account for everything from event meeting space and fees to housekeeping and package/baggage handling. Major virtual events may also have rental costs you will need to include such as studio space or recording equipment.
3. **Catering:** This onsite expense includes all food & beverage charges, taxes, tips and service fees.
4. **Staffing:** Most club events won't really have too many staffing costs because they are usually volunteer-run. However, if you require any hired help (think about security, registration assistance, etc.), this is the area to include those costs. You would also likely want to include any meals, travel or hotel accommodations that you cover for your volunteers here.
5. **Event Décor:** This budget category is mostly limited to in-person events and would include expenditures on things like flowers, tenting and other event decorations.
6. **Transportation:** While this line item can seem pretty self-explanatory in the way of air travel, rental cars or shuttle buses, it also encompasses gas, tolls, parking fees and travel insurance.
7. **Entertainment/Speakers:** Every event deserves a little flair, so you must make sure to properly account for it in your budget. Regardless if the event is held in-person or online, there are two major items to remember: speaking fees and A/V costs. If you incur either, account for them here. Depending on the type of event, you may also have to pay for live entertainment or music licensing fees.
8. **Technology:** This one is likely most significant with virtual events. This would include things like your registration platform (also important for onsite events), Internet fees, and any related integration costs.
9. **Marketing:** Any costs associated with branding, advertising or publicizing the event will likely fall into this category. This would include things like printing charges, direct mail

costs, paid print advertisements, photography fees, signage, paid search ads and social media ad campaigns.

10. **Gifts:** You know that swag that every event has? This is where those promotional items will go. If your virtual event sends gift bags to attendees' homes or gives an online gift card for registering, make sure to account for it here.

11. **Other Activities:** Many longer in-person events may include special tours, sporting events, leisure activities or other arrangements to allow for attendees to socialize and network in a more relaxed setting. Depending on the type of activity, you may need to include a separate breakdown of costs to give the full financial overview.

Of course, there are going to be those expenditures that don't fit into any of the aforementioned categories. In those situations, it is helpful to build a miscellaneous section into your budget. An article from the Professional Convention Management Association (PCMA) asserts that this is especially important for new virtual events where there are still many unknown costs. You will also want to include an emergency fund within your budget to give the event a little financial cushion should anything go awry.

A final note on expenses: keep in mind what costs are one-time and which ones are recurring. A blog posting from Element Three, a branding and marketing firm, notes that these are things like recurring rental fees, subscription charges or software licensing fees. It can also be a significant purchase (e.g., expensive camera equipment) that will be used across many events. In those instances, Element Three suggests looking at how much the club will need to space out the purchases and how to divide that expense properly over multiple event budgets if so chosen.

EVENT CANCELLATION INSURANCE

Event cancellation insurance is one final piece to consider as you plan your budget, as this is not currently covered by Sertoma's insurance program. Though an additional expense for the club, the insurance may be necessary to avoid significant risk if you are hosting a major event.

According to a 2016 article from the American Society of Association Executives (ASAE), organizations opt for event cancellation when facing "two basic maxims of risk management" – high-severity loss that threatens the organization's financial viability and protection against low-frequency, high-severity events. This is important because event revenue is often the biggest source of income for many nonprofits, making it an asset worth protecting.

When making a purchasing decision, ASAE encourages organizations to consider what portion of their revenue comes from the event; if the organization can absorb the lost revenue from a

cancellation; if the event is vulnerable to outside factors like weather or disease; all nonrefundable or prepaid financial commitments; and the organization's overall risk tolerance.

A few other points to keep in mind from ASAE:

- Events and meetings are non-tangible property that you want to protect just as you would any other physical and intellectual properties.
- Understand what is excluded in your policy. Typical exclusions may include things like financial failure, loss of financial support from other entities and other elective "necessities" (e.g., inconvenience, disliking local ordinances, etc.).
- Comparison shop – cost may not be as high as you think.
- Your force majeure clause does not usually account for your total net income, which can be critical when it comes time to refund registrations and sponsorships.
- Know what self-insuring really means. ASAE says many organizations use this term incorrectly, instead relying on retained risk. Make sure that any decisions here fall within the intended and/or mandated scope of revenue use.

EVENT PLANNING 101

EVENT FORMAT

Most Sertoma club events are going to focus on one of three main purposes: to educate, to socialize or to fundraise. In other words, we are either trying to teach others about our mission, looking to recruit or recognize others who will help us support our mission, or seeking financial support to make our mission possible.

EDUCATIONAL EVENTS

Let's focus first on educational events. These can take many shapes and sizes depending on the impact that you want to have and the audience that you wish to reach. It may be as small as a club meeting, as geographically expansive as a regional convention or as widely impactful as a community event. When it comes to format, these events fall within three different categories, says meetings app company MeetingPlay:

1. **Presenter:** In these types of events, the speaker has a mostly one-way conversation with the audience about a topic, often to excite attendees about a larger event or to address specific concerns. Examples include keynote presentations or townhall meetings.
2. **Thought Leadership:** This style of event focuses on more informal conversations with recognized subject experts. Q&As typically play a big part in helping to keep the audience engaged. Example formats include panel discussions, fireside chats and roundtable discussions.
3. **Collaboration:** With collaborative events, the purpose is to provide ample opportunity for casual and/or formal networking. While these sessions might include some moderation, the focus really is on peer-to-peer interaction. MeetingPlay lists breakouts, Ask Me Anything (AMA) sessions and themed happy hours as examples of collaborative events.

Of course, there are some educational events that are going to be more of a hybrid of two or three of these formats. Often longer in length – whether by hours or days – these hybrid events will offer opportunities to learn, hear from leadership and connect with other attendees. Events typically come in the form of well-known meeting styles like conventions, conferences, one-day summits, festivals, fairs and expos.

VIRTUAL EDUCATIONAL EVENTS

Thanks to advances in technology, many traditional events can now exist within a virtual space. There are also new opportunities to create online-only events that follow some of those most popular virtual meeting formats.

Guild Digital Limited, a meeting planning software provider, points out that webinars can be a great option here. They are the "entry-level" of online learning, focusing on a single topic over a shorter time period (30-60 minutes typically). Webinars usually include a short Q&A period at the end if time allows. You can also extend your webinar program/series with what Guild calls "Webinar+." With this format, you will introduce additional content to give attendees a deeper dive into the topic, thus building on impact and value.

Regardless of format, MeetingPlay points out that moving events online forces planners to become more flexible and innovative. It can be especially challenging to make traditionally in-person events engaging and memorable when they become virtual. However, making the change also gives you the opportunity to breathe new life into your sessions.

SOCIAL EVENTS

When it comes to social events, it's all about engaging your attendees in opportunities to connect with your club, its mission and/or each other. Its exact purpose can be one of many – anything from membership recruitment and recognition to networking or just pure fun.

Examples of social events include but are not limited to:

- Awards banquets or galas
- Social mixers
- Cocktail hours
- Business after hours events
- Membership parties
- Club anniversary dinners or similar events
- Public community events (e.g., craft fairs, street festivals, etc.)

FUNDRAISERS

Fundraisers are going to require a special set of planning requirements you will want to keep in mind, particularly when it comes to how you collect donations and spend your budget. It is important that the planning team work closely with the club treasurer to make sure events meet any local, state and federal guidelines. Sertoma also provides some general guidance in its many manuals and trainings available through the Member Center at members.sertoma.org. If additional questions arise, contact Sertoma Headquarters and/or a trusted financial professional for assistance.

Sertoma clubs have become experts in putting together effective and innovative fundraisers to support their many mission activities. On the national front, Sertoma is proud to offer the CELEBRATE SOUND® turnkey fundraising and awareness program. This initiative helps promote our national hearing health mission on a local level. To learn more, visit celebratesound.org.

Other fundraising ideas from our clubs:

- Fundraising meals – benefit dinners, pancake breakfasts, barbecues, etc.
- Tournaments – golf, clay shooting, poker, etc.
- Special events – duck races, cooking competitions, car shows, silent auctions, etc.
- Holiday events – Christmas tree lots, pumpkin patches, flag sales, etc.
- Product sales – cookbooks, t-shirts, coupon books, etc.
- Online fundraisers – social media fundraising campaigns, online auctions, etc.
- Community events – casino nights, car washes, bake sales, etc.

WHEN & WHERE

The next step in your planning process is to choose when and where your club will have the event. The two will often inform one another. Your dates may be subject to venue availability; other times, you may choose your venue based upon your required dates. Let's break these down separately.

SCHEDULING YOUR EVENT

When is the best time to host your event? This is an age-old question, with an answer that depends greatly on the individual circumstances you're facing. UK-based Billetto Blog recommends using the exclusion method to make the scheduling process easier. They suggest taking the following considerations into account when choosing your dates:

Audience. This should be your top priority. It is all about choosing dates and times that are convenient and practical for the attendees you want to attract to your event. Are they willing to take time off from work? If not, you may want to avoid work hours and/or workdays.

Planning timeline. Make sure to give your planning team plenty of time to execute the necessary steps for your event to be successful.

Vacation schedules. Are summer vacations, spring breaks and holiday plans a major factor for your audience? Don't plan your event during these treasured downtimes.

Community factors. Look at what is going on in your area. You don't want to plan your dates during another major public event or in the midst of key elections. You'll also want to take into account any major public works like transportation strikes, planned engineering works, major road construction, etc.

Consistency. Depending on the event and your club, this one may or may not matter. Some prefer to have the event at the same time each year. If that is not a huge factor, you might consider switching it up to see if you reach a new audience.

Competition. Are there other local organizations that hold events similar to yours? Make sure that your event doesn't clash with theirs. Billetto recommends mapping out competing events on a calendar to give you a clear picture at a glance.

Weather. If you live in an area where weather is a factor, you have to take it into account. From hurricane season to winter weather to spring storms, consider any environmental conditions that could impact the success of your onsite events (indoor and outdoor).

Awareness Days. If your event has a specific theme, see if it matches up with an awareness day or month. This can be a great way to draw media attention as many newspapers, radio stations, blogs and TV news programs like to report on these lighthearted or charitable days.

Partner availability. Most clubs have venues, vendors, speakers, entertainment and other key partners that they like to work with on their events. Check with any people and businesses you want on board to make sure they're available on your prospective dates.

CHOOSING YOUR VENUE

There is nothing more important to an in-person event than the location. Choosing the venue is a critical process with very impactful repercussions. You will want to start your search as soon as possible – at least four to six months in advance, according to Whova, an event technology company. In fact, they advise that planners begin as soon as they have their budget, estimated event size and space requirements in place.

Whova's Venue Considerations:

- Location: It's all about convenience, whether it is to attendees' homes (local events) or to major transportation hubs (regional and national events).
- Parking: People want to know that they will have a place to park their cars. Options can include onsite parking lots, accessible nearby lots and valet options. If parking is not going to be an option, look into hired ride services (i.e., cabs, Uber or Lyft) that will work with you to offer a discount or other ridesharing options (i.e., shuttles). Be sure to communicate all of the options to potential attendees.
- Capacity: How many people can fit into your venue, both comfortably and so that you meet fire and safety codes?
- F&B Minimums: Ensure that your past event history aligns with what is required within your event contract.
- Services/Amenities: What do you need to have for your event to work? This includes things like kitchen access, catering, basic décor (tables, chairs, linens, etc.), setup/cleaning crew, AV capabilities, etc.
- Layout: Your space needs to meet the needs of your team, attendees and activities. Whova recommends reviewing floorplans and doing a site walkthrough to check for things like traffic flow and activity/meeting space.

- Accessibility: You want everyone – regardless of ability – to be able to easily and comfortably access your event. Take a look at who your attendees are and make sure that your venue meets their needs (parking, audio, visual, wheelchair access, etc.).
- Miscellaneous: Whova also includes acoustics, insurance, ambiance and flexibility among its selection considerations.

There are a few tools and resources out there than can make your search a little more manageable, Whova suggests. This includes working with a professional site selection company, contacting the local Convention & Visitors Bureau (CVB), checking event listing sites for venues where other events are held, and searching online tools like Peerspace or EventUp.

CHOOSING YOUR HOST CITY

While most club events are going to be held in the general area where your attendees live, work and play, there may come a time when you have to plan an event that includes people from across a region or even the country. In those instances, the destination plays a major role in your ability to attract strong attendance.

A 2017 article from ASAE advises that there are a few things you should take into account when choosing a host city. First, you want to make sure that travel and accommodations will fit into your attendees' budgets. They will only come if they can afford it. ASAE also points out that people often view these trips as an experience. Attendees want to take advantage of what the area has to offer – from dining and entertainment to activities and tourist sites. They often love downtown areas. Local attractions, in particular, provide an exciting opportunity to host unique events and receptions.

Transportation is another key factor to selecting a host city. How easy is it to get there? Are flights accessible? Are numerous layovers required? What about when they arrive – how easy is it to move around the city? In certain parts of the country, you'll also want to think about travel by train, bus and subway.

CHOOSING YOUR VIRTUAL VENUE

You might have thought that moving your event online would prevent you from having to choose a venue, but that couldn't be further from the truth. It just takes on a different form as you're now charged with selecting a virtual event platform.

For small events like club meetings or a basic webinar, you may not need to put a lot of thought into it. Sertoma offers free Zoom services to its clubs. Clubs can reserve their meeting time by signing up in the Club Resources section of the Member Center online.

However, if your event is more complex, you might want to consider other options. Virtual events platform Accelevents explains that a dedicated event platform can provide you with a variety of integrated services such as hosting, planning, production and automated marketing. Common features will include branding elements, the ability to record and store content, sponsorship options, broadcasting capabilities, different meeting space offerings, mobile compatibility and 24/7 live customer support.

Let's break this down a little more. Keep in mind, some of these features may not be a priority for your event. You only need to consider those that matter to your club.

- **Communications Features:** This is how you will communicate with your attendees and how they can network with and talk to one another.
- **Event Management:** This includes professional event registration, marketing options, mobile apps, website services, presentation management, A/V controls and more. If you will be using more than one platform, you must make sure that the various software programs will integrate together.
- **Content Handling:** Reusing your content to engage with and market to attendees can be important depending on your event. That is why you will want to know how the platform captures, records and stores event content. Depending on the event, you may also want the ability to offer scheduled prerecorded content.
- **Vendors, Sponsors and Advertisers:** Look at what capabilities and limitations your prospective platform offers in regards to these key stakeholders. This can include monetization for ads, the ability to visibly promote your sponsors and more.
- **Space Offerings:** What types of needs does your virtual event have? According to Accelevents, this may be things like online exhibit space, special breakout sessions, general lobby areas, registration and virtual info booths.
- **Branding:** Events are often there to support a larger brand – such as your club or flagship mission. You want to make sure that your virtual hub can match that look and message. Otherwise, attendees might become confused to the point where they mistake the event as belonging to someone else.
- **Technology Needs:** You will want to be able to access the backend to know which processes are automated and which rely on humans. This is also the time to think about analytics and metrics that measure the success of your event and give insight into things like engagement, lead generation and other datapoints that can guide your event.

- **Broadcasting Options:** Some events require only live broadcasting, while others may need the option to put prerecorded content alongside live Q&As.
- **Social Media Integration:** This is a relatively new priority for many clubs, but it's the price of entry now, rather than an extra. Accelevents advises that decision makers look for social integration that makes it easy for your event to be easily shared and talked about online. This can be a great feature to widen your reach.

BUILDING YOUR TEAM

No one person can do everything by themselves. As we know by now, planning events takes the careful consideration of many steps and details. According to Endless Events, a national event-production company, "The cornerstone of a successful event is a dream event planning team where everyone has a role to play and eagerly contributes to the success of the event."

Building the right planning team, which may include both volunteers and paid professionals, ascertains that there is a balanced approach to executing your event. Endless Events notes that having your team in place allows multiple activities to happen simultaneously, assists with problem solving, contributes a variety of skills to a project and reduces stress.

Endless Events suggests that an event team include:

EVENT CHAIR
Someone has to be in charge of the ship. This leader sets the tone for the entire planning process. They are charged with understanding the event's goals and sharing that vision with the rest of their team. They are also there to support that team by backing up committee leaders, assisting volunteers and providing encouragement.

PROGRAM COMMITTEE/TASK FORCE
This committee is seen as the administrative group of your planning team. They are the ones who will plan, execute and manage the fine details and logistics that make the event actually happen. Their duties typically include things like estimating attendee numbers, venue selection, working with catering, creating event seating and décor, setting the schedule and program and managing VIP attendees. Endless Events advises that this committee be small, maybe as few as two people, so that you don't have too many proverbial cooks in the kitchen.

CREATIVE COMMITTEE/TASK FORCE
Marketing, media management, attendee engagement and branding are all responsibilities that fall upon this important work group. Endless Events says it's especially important for this committee to understand the theme and goals of the events as they are the key

communicators with attendees and other stakeholders. They oversee attendee engagement, event documentation (including photography and videography), social media management, developing materials, event branding, maintaining the event website and much more. This committee's size will likely vary depending on the scope and size of the event.

OPERATIONS COMMITTEE/TASK FORCE

When it comes to actual boots-on-the-ground work at the event, your Operations team is going to be where you will turn. Unlike many of the other work groups, this one may include external parties such as vendors or event venue staff. Their responsibilities and committee size are going to also depend on the type of event. Their duties might include things like setup, tech support, attendee management, cleanup, event security, onsite registration and informational assistance.

BUDGET COMMITTEE/TASK FORCE

Every event needs financial resources, and the Budget Committee is there to manage it. They are charged with overseeing the budget, payments, cost estimates, sponsorship funding, financial recordkeeping and other money-related aspects. It's important to get this group involved from the very beginning, Endless Events advises, because it's the budget that dictates so much of the event.

ADDITIONAL PLANNING TEAM BEST PRACTICES

- Keep a schedule/timeline of who is doing what when.
- Choose your committee leaders very carefully.
- Practice strong communication between your leaders where appropriate.
- Make sure that everyone has the same overarching event goals.
- Share the excitement!

BUILDING YOUR EVENT SCHEDULE

From an event that lasts just an hour to one that spans several days, it's important that careful planning go into building out the schedule for each of your club's events. Having your timetable in place not only makes sure that planners and attendees are on the same page, it also ensures that event goals are met and that everything that's supposed to happen actually happens.

Like most things covered in this guide, there is no one way to put together an event schedule. It truly is going to depend on the scope and goals of the event. However, Eventbrite has put together a few best practices to guide planners as they put together the flow of their event.

1. **How long will your event last?** It only makes sense that duration would be the first major consideration that goes into planning. After all, it dictates how much time you have to fill with your various activities. Once you have decided on your rough time parameters, Eventbrite suggests breaking it down into small time chunks, typically 30-60-minute slots, to make planning more manageable. The longer the event, the more important this style becomes. It helps prevent attendees or guests from becoming overwhelmed.
2. **What activities need to be part of your schedule?** This is where you should spend time compiling a detailed list of everything that needs to fit into your schedule. Remember to think about all of your stakeholders, Eventbrite advises, so that nothing is missed. This means scheduling times for sponsors to speak or free time for guests to socialize.
3. **How will you communicate your schedule?** For a short webinar or a regular club meeting, a simple email will typically suffice. However, when it comes to something like a formal fundraiser or a multi-day regional convention, the schedule may need to be a little more prominent, whether it's a printed program or a full event website. Eventbrite recommends deciding how you want the event schedule to look and whether it will work across all your preferred dissemination channels.
4. **What part will people play?** This question again speaks more to longer events. You don't want to overload your guests, leaving them feeling exhausted and overwhelmed. That's why it's so important to think about their overall experience as you put together your event timing.

EVENT REGISTRATION & PRICING

Pricing is a critical but difficult part of putting together any event. According to The Balance Small Business, pricing is a very delicate balance. If you aim too high, you'll rule out many potential attendees from being able to come, thus directly impacting your attendance goals. On the other hand, if you underprice your tickets, you run the risk of not turning a profit. Therefore, The Balance urges planners to consider two factors when choosing a pricing strategy – anticipated costs and anticipated attendance.

There are many industry-standard approaches to registration pricing, including:

- **Retail Pricing:** This follows the same formula that traditional retail companies have used for decades. To determine your ticket price, you will take your total expenses, add the budgeted profit margin and divide the sum by your lowest projected attendance figures.

- **Market Pricing:** This approach works backward, meaning planners start with the ticket price and then set their budget accordingly. The Balance says that perceived value plays a critical role with this strategy.
- **Limited Access Pricing:** This price strategy centers upon a tiered structure where guests receive more value and benefits the more that they pay. It encompasses the standard Basic vs. VIP packages that many events offer.

Your planning strategy should also consider standard practices such as early bird pricing, late registration penalties and post-event access.

In the end, the pricing strategy you ultimately choose is going to vary depending on the type of function. When it comes to your fundraisers, you are really going to be focused on making sure that your profits are higher. With something like a webinar, your expenses are likely fairly low comparatively, and you may not be as concerned with what you're going to charge (if anything).

VIRTUAL EVENT PRICING

Pricing an online-only event follows many of the same best practices as one held in person, but it also offers some unique challenges. In particular, it can be especially difficult to prove your value when attendees are used to gathering face-to-face.

Accelevents really hits the nail on the head with this one: "The price of your virtual event needs to be low enough to offer value to your target audience but also high enough to convey that your event provides an experience worth having." Of course, the event also needs to make money. The test then becomes about finding the right balance between value and price.

Doing this may be admittedly difficult, so Accelevents encourages planners to consider:

- Expense savings, both by the event itself and by the attendees. Consider the "all in" cost of attending a traditional event, including transportation, parking, etc., and price your virtual event accordingly.
- Perceived value of the event – what attendees feel they get out of attending. This comes in contributions to a cause they love, what they've learned, being entertained, networking opportunities, etc.
- The newness of the online format. Without a proven track record, you will likely want to start on the lower end with pricing and then slowly increase it as the event gains popularity.
- Tiers can be great in an online environment. Your offerings may even include a free level.

SPONSORSHIPS

Sponsorships are often an excellent source of income for nonprofit organizations like Sertoma. In the case of fundraisers, they can also lead to additional donation revenues through individual giving and ongoing business relationships.

According to Wild Apricot, an all-in-one membership management software provider, a sponsorship is essentially a basic exchange of money for services. Typically, a business will contribute money or resources to an event or fundraiser in exchange for promotional benefits. Sponsorships are attractive to companies because they can help them reach very specific audiences, offer a competitive advantage and promote a charitable reputation.

SPONSORSHIP PACKAGES

Every organization is going to have a slightly different approach to building sponsorship packages. What works for one club – perhaps for even one event – will not necessarily work for another. It's essential to look at each sponsorship opportunity separately. This may mean even looking at your sponsors individually.

In fact, nonprofit strategy firm One Nine Design says planners should actually think about their sponsors, not the event, when coming up with sponsorship packages. Unlike many other phases of the planning process, your priority is going to be different here. The firm believes that by focusing on potential sponsors first, you are able to better speak their language and share why your event is a good investment for their business.

Therefore, while there may not be a one-size-fits-all sponsorship program out there, there are four basic guidelines you can follow when putting together your packages, according to blog GetSponsorships.co.

1. *Share Your Background.* This is where you state who you are and what you want. It allows potential sponsors to get to know your event, your organization and how their company fits in with your vision. Background information should include things like the purpose of the event, your intended audience, expected attendance, event goals, what

sponsors contribute and perhaps even a list of past sponsors.

2. ***Why Become a Sponsor?*** Sponsors are looking for strong ROI, so they need to understand what they will get out of lending their name to your event and giving financial support to your club. What makes it worth their resources? The more specific and detailed you can be, the better.

3. ***It's All About the Benefits.*** The blog reminds event planners that sponsorships are often a marketing tool for businesses, so you must be creative in your offerings. Find ways to maximize promotional opportunities. Make sure that your pricing matches the sponsors you're targeting. If you are able, create different sponsor tiers so that you can meet the needs of companies of varying sizes and budgets.

   One Nine Design offers some great examples of potential benefits. This could include a tour of the nonprofit you're supporting (if they can meet a client or board member, even better), thank-you ads in places they advertise, a custom message in the event program (video if a virtual event), creative centerpieces at in-person events, creative logo placement (think about email, website, presentations, etc.) and complimentary tickets. Another great idea is to get creative with event gift bags. Even if your event is online, find a way to put together a virtual swag bag with coupons and online gift cards that can be emailed out to your guests.

4. ***What Comes Next?*** Include a clear Call to Action so that your sponsors know what to do next. You will also want to make sure that they have your contact information.

Other tips from GetSponsorships.co include:

- Avoid generic packages when possible.
- Design packages around your event's theme.
- Allow sponsors to customize.
- Include sponsors as you plan your packages; they may have ideas you haven't considered.
- Find ways to stand out and be creative in your pitch.

YOUR SPONSORSHIP VOLUNTEER TEAM

Just like any other phase of your planning process, you will want to have a strong team in place to oversee your event sponsorship program. Their duties depend on a strong foundational

understanding of fundraising and sales, notes VolunteerMatch, an online volunteering platform.

FUNDRAISING LEAD

This individual will spearhead your fundraising efforts and oversee your sponsorship team. Their goal is to make sure that your event brings in as many fundraising and sponsor dollars as possible. They do this by understanding how the event fits into the club's mission, engaging sponsors and maintaining key relationships, explains VolunteerMatch.

SPONSORSHIP SALES TEAM

This small team is charged with prospecting sponsorship leads, putting together customized proposals and making the pitch. The more experience they have with sales, the better served your efforts will be in the end. VolunteerMatch says you will also want to recruit volunteers with a wide circle of influence. These personal connections come in handy when you're looking to connect with potential sponsors.

PROSPECTING

How will you find your potential sponsors? Clubs can use a variety of methods to make sure that their prospecting efforts are successful. *Sports Planning Guide*, a publication dedicated to facilities and sporting event planners, likens the process to archery. They explain that you don't want to just shoot blindly into the air. Instead, you set your sights on your target, you assess it, you aim and then you shoot.

Prospecting typically starts with a simple brainstorming session. Your volunteers will sit down and make a long list of any potential sponsors that they should seek out. It doesn't need to be a deep discussion with a complete plan of action quite yet. Instead, the focus should be merely on coming up with a detailed rundown of prospects.

Your prospects will likely come from one of three places. Wild Apricot furthers the archery metaphor by setting these sources up like a target. Your bull's eye will be those companies that already love you. They have sponsored events in the past, regularly support your cause and/or are members of your club.

The next ring, which Wild Apricot calls the "Inner Circle," is going to consist of those companies your club has a working relationship with but have not yet become a sponsor. Vendors are a perfect example. As their client, you're a target for additional profit. Mutual investment through event sponsorship is a great way to achieve exactly that.

On the outer ring of your target comes pretty much everyone else. There is no real connection between your organization and these businesses. Wild Apricot estimates that this will apply to approximately 95% of your prospects.

Just like when you're working on membership recruiting, you'll want to start with your first-tier contacts and then work your way out. *Sports Planning Guide* suggests spending some time to prequalify your prospects to make sure they're a good fit. You can do this by using simple online searches and social media scans to get an idea of their sponsorship history. Once this research is in place, you can move onto prioritizing your list and making the pitch.

Another important part of prospecting comes in communication. Wild Apricot suggests keeping track of your prospects in some sort of contact management system, even if it is as simple as an electronic spreadsheet. This allows you to segment and sort your potential sponsors, as well as keep track of all interactions, research details, follow-up actions and reminders.

THE FIVE PHASES OF THE ASK

1. INITIAL MEETING

The Sponsorship Collective says that the primary goal of your first meeting is discovery. You're not there to make the pitch or get a commitment. Instead, you are there to gather information and qualify the lead.

It is during the meeting that you will spend time getting to know your sponsorship prospect. Your role is to ask questions and listen, rather than sell your event. You will use your time with the company to learn about their target audience. This means finding out how their customers make purchases and their annual sales goals, as that often leads you to a better understanding of the company's priorities. For instance, companies who struggle with getting customers into their sales funnel may care more about awareness than those who are looking to improve their public persona in the face of customer service issues.

This meeting can also be a great opportunity to learn about their expectations as a sponsor. Getting them to talk about past experiences that did not provide the intended ROI can help you figure out what not to do. You'll also want them to talk about positive experiences that can reveal what elements they value in a sponsorship package. Directly asking them for guidance can really help you get it right the first time.

2. PERMISSION TO PITCH

Your club should never move onto the next step of making the ask without permission. The Sponsorship Collective suggests asking qualifying questions like, "I think it sounds like we have a fit here, would you agree? Is this a good time for me to put together a draft proposal for your feedback?"

It is only after they have agreed that you should submit a proposal. If it's not a good fit for them, you'll waste your time and resources on a dead-end lead.

3. THE PROPOSAL

The sponsorship proposal has long been the standard promotional and sales tool organizations have used to approach companies for their sponsorship support. These professional, polished kits provide a comprehensive overview of sponsorship offerings, an event background, attendee information and more.

However, many nonprofits have found success by deviating from the traditional proposal. According to a blog from iWave, a donor research solution provider for nonprofit organizations, you may not even need a proposal at all. It just depends on the company, their needs and your relationship with them. Instead, they caution that the best approach may be to talk about your event's assets, demonstrate value and then negotiate the sponsorship based on individual needs.

4. ASK & DELIVER

From there, it's only natural that you will make your ask. The best method is typically face-to-face, but there may be times when that is not possible. When you can't meet in person, rely on traditional communication mediums (e.g., letters, mailed sponsorship kits, phone calls, etc.) and modern methods (e.g., virtual meetings, online sponsorship kits, email pitches, etc.).

If you are lucky enough to get a sponsorship commitment, you must make sure that you deliver on any and all promises. It's your job to make sure that sponsors get everything possible out of their investment. Ensure that their logos are properly placed, that all deadlines for material submission are thoroughly communicated and that any other benefits are readily available to them. iWave advises that there may be some expenses associated with this phase that your club will need to budget for, like graphic design or ad buying.

5. MEASURE THE METRICS

The final step happens after the event is over. The goal here is to ensure positive word of mouth and bolster repeat business. iWave suggests compiling metrics and analytics into a fulfillment report. Here, you will include data about the event such as attendance figures,

dollars raised for the club or mission, major event highlights, press coverage, web traffic and more. The report should also have an overview of the benefits your promised and delivered to them. Photos to show things like logo placement, signage and onsite promotions can be especially constructive.

You will then want to present your findings to each sponsor at a post-event meeting. Conduct a brief interview to learn more about their experience – what worked, what needs improved and what they suggest for the next year. This is also a great time to gauge their willingness to become a repeat sponsor. They're hopefully still excited about the benefits the sponsorship brought to their company, and highlighting that ROI is a prime opportunity to make the ask once again.

WORKING WITH SPEAKERS

Not every event has a speaker element, but for those that do, it's important that you have a well-coordinated plan in place for working with them. This includes selecting the right speakers, onboarding them and leveraging their appearance as a marketing opportunity for your event.

FINDING SPEAKERS

Finding speakers can be an arduous task. When you're looking for a single keynote speaker, you are charged with finding someone with the marketability, knowledge and appeal to carry your event's marquee. On the other hand, when you have several slots to fill, it can be challenging to find enough presenters who can offer expertise on your chosen topic while also conforming to budget and time constraints.

There are many places you can go to look for speakers. Most planning professionals agree that the best place to begin your search is within your own network. This saves you time in research, makes it easier to secure a commitment and often leads to a lower speaker's fee – or even a free appearance if you're lucky!

Think about the organizations and groups you belong to in your community. Professional associations, Chambers of Commerce and nonprofit organizations you support can all be a great

source of speakers for club meetings, one-day summits and regional conferences. You should also consider experts from within your own club and/or donor list. It's amazing the gifts that our Sertomans have to offer!

Another excellent source for speakers is entities within your community. Think about elected officials, city government employees and local universities. Each of these places has experts in programs that are likely to be of interest to your members. Likewise, groups like Toastmasters offer a wide array of speakers well-versed in interesting topics sure to draw the attention of your audience.

The final place you may consider goes outside your community. You can seek out online resources like LinkedIn or the National Speakers Association to see who else is available. You can even put out a call for proposals if you want to truly gage interest in speaking to your club or at your event.

Finally, consider Sertoma leaders! Your Sertoma leaders have an array of experiences and knowledge. If your event is hearing health focused, Sertoma's leadership can be an especially great option.

A Note About "Free" Speakers: We all know that club funds are limited, so finding a free speaker can be a godsend when working on a shoestring budget. However, just because something is free, doesn't mean that you should just accept it without thinking it through first.

Online events platform provider Gevme suggests that you try to make the experience as convenient as possible for your speaker. This means setting any expectations about what will be provided – whether it be a free meal, hotel accommodations or travel reimbursements – up front so that everyone is on the same page. It's also important that the speaker have an appointed liaison who will work with them before, during and after the event. They need to know who to go to with questions and issues.

VIRTUAL SPEAKERS

Finding virtual speakers will typically follow the same process as selecting onsite presenters, but there are a few additional considerations you might want to take into account. As we all know, holding an event online opens it up to having a speaker from anywhere in the world without the additional travel costs or schedule constraints.

Format is one of the biggest considerations when it comes to choosing speakers for an online event. According to ASAE, there are many ways to incorporate speakers into your virtual program. For example, you could offer a prerecorded interview between your club president and the speaker. The speaker can also prerecord their session on their own so that you can

broadcast it during your virtual club meeting or fundraiser. Of course, you can always go the traditional virtual route and just broadcast the session live. It is all about selecting the format that works best for your event, speaker and attendees.

Comfort with technology is equally important to selecting virtual presenters, notes ASAE. You need to make sure that the speaker is equipped with the skills necessary to put on their presentation. Are they comfortable with the chosen platform? Can they troubleshoot small issues on their own? Do they have the Internet connection and equipment necessary to even hold their presentation? The answers to these simple questions are critical.

ONBOARDING

According to UK-based Gallus Events, "There is a direct correlation between how well a speaker is briefed and how good the [event] will be. The better the briefing, the better the content."

Onboarding your speakers is important to ensuring that your club's event runs smoothly. You don't want someone to show up, whether it's in person or online, without knowing what they are supposed to do and where they are supposed to go. That is why planners across the board suggest putting all of the expectations, resources and details that a speaker may need into a speaker's brief. The goal of this document, which can be as simple as a single email or as complex as a spiral bound book, is to truly prepare a speaker, leading to better sessions and happier attendees.

Gallus recommends that a brief include:

1. **Event Logistics:** When and where the event will be held.
2. **Session Details:** Length and format of the session and any information about other speakers or moderators that may be involved.
3. **Presentation Details:** Deadlines, preferred presentation software program and any expectations about delivery.
4. **AV Details:** What is available and how to request additional equipment (if available).
5. **Audience Information:** A breakdown of attendees and their reasons for attending.
6. **Event Objectives:** What is the event trying to achieve? What are attendees trying to achieve while there?
7. **Key Themes:** Any themes that will run throughout the larger event (if applicable), especially if they will be utilized by other presenters or leadership.
8. **Structure Guidance:** Any suggestions about how to best present to your attendees.

VIRTUAL ONBOARDING

There are a few additional considerations for virtual events. Probably the most significant step is to hold practice sessions with all speakers. Even if they have done a thousand speaking engagements, your event is important and offers its own set of circumstances. Doing a quick tech walkthrough ensures that they are comfortable with the system and gives you the opportunity to address any challenges, notes Attendify, a virtual event tool platform.

Before you actually hold your practice sessions, you will need to do a little administrative work. Make sure to set up your sessions well in advance, communicate the link and any connection instructions to your speakers and check that any permissions (e.g., camera/mic access) are properly set.

During the session, it's important to have as many speakers as possible involved. If there's only one presenter involved in your event, this is simple. However, when you have a longer event with several speakers or a moderated panel with two or three people, it's best that everyone receives the same information at the same time as it leaves less room for ambiguity. You will want to test things like enabling microphones and cameras, starting and stopping screen sharing, and managing comments and questions submitted by attendees. You're basically there to test the workflow of your virtual event.

Attendify also suggests going over troubleshooting protocol during this time. You can work out the kinks with your presenters and then put out a set of instructions for your attendees so that they don't face the same issues. This would include things like browser compatibility, disabling access-inhibiting ad blockers, common sound or video problems/solutions, working with and around VPNs, etc.

WORKING WITH SPEAKERS

Gallus Events offers a few additional best practices for working with speakers:

- Treat all speakers with common courtesy. Make sure that they are formally introduced and thanked at their session. Find ways to recognize them on social media and send a thank-you note after the event has concluded.
- Record the session if possible but only with their permission. This can be valuable if they want to pursue additional speaking opportunities. Send out a link to them after the event but also make sure to find ways to leverage it as a promotional opportunity for your club via your website and/or social media.

- Use social media to highlight your speakers. What a great way to garner engagement before your meeting, event or fundraiser! You might have attendees leave potential questions, answer a poll or take part in a short, interactive Q&A.
- Give them full access to your event for a more immersive experience for speakers and guests alike.
- Offer honest, constructive feedback. Whether you do a post-event survey or have feedback forms right there onsite, this can be one of those most useful things you can do. Gallus recommends doing this by email when possible to avoid divisive conversations. You can say something like, *"Our attendees rated you a 3.5 out of 5. The average score was 4."* Then, supplement the feedback with any additional comments that might be motivational or offer ideas for improvement. The goal is for everyone to learn from the event, so why wouldn't you want that to extend to your presenters?

MARKETING YOUR SPEAKERS

If your event has a speaker element to it, it truly becomes one of the biggest marketing assets you could hope for. Often serving as the backbone of the event experience, Medium's Hubilo Blog explains that presenters offer the unique combination of boosting an event's reputation, adding credibility, giving attendees content they want and creating brand advocates.

Let's dive into the last one a little deeper. Speakers are typically keen to promote the events they are speaking at and the organization the event supports. When these presenters share these promotional messages with individuals within their network, on their mailing lists and to fans/friends on social media, your event's reach grows that much wider.

Hubilo says that achieving this goal comes down to choosing the right people: "You want your speakers to influence your audience. You don't want to just push the fact of their presence in their face." Therefore, you want to select speakers that will appeal to your target demographic. Does it make sense to have someone speak on long-term care insurance if your audience is predominantly under the age of 30? On the other hand, you wouldn't likely choose to have someone present on the newest child care program in town if your audience was made up of all senior citizens. By choosing someone that fits within your target demo, they are more likely to draw similar attendees from their own following.

You also want to give your speakers prominent placement in your marketing in order to leverage their presence at your event. Hubilo suggests using proven techniques like highlighting them in invitation emails, making special announcements on social media or adding their name/picture to website banners. You can also work with speakers to secure special content

that will cross promote their session. Guest blogs, special videos or a short interview article can be great tools here.

Finally, simply ensure that you make the ask. If you never request that they share your event, it might never even occur to them. Thankfully, social media makes this easier than ever before. Whether they share your posts, link to their guest blog or provide unique messages on their social media channels, every piece of professional, positive promotional content is sure to strengthen your event's marketing plan.

EVENT MARKETING

Marketing your event is something that happens at nearly every phase of the planning process. It begins well in advance of the event and continues through event day and long after the event has wrapped.

PRE-EVENT MARKETING

Eventbrite UK segments all marketing prior to the event into four phases:

1. **Pre-Event:** This would be the very initial stages of your marketing plan. It typically begins by building out your pre-launch web landing page, which would include barebones details about your event. From there, you'll want to have a social media post to announce the event. When these two key pieces are in place, you may start your partner outreach and highlight the purpose of your event in a blog post or brief piece in your next newsletter.
2. **Launch:** Once you are ready to go live with your event registration, you will start to work through your launch activities. This means getting your website and key partners in place. You can choose to launch your event with any combination of email blast, press release, social media announcement and blog/article.
3. **Day-to-Day:** As you move into your third phase of pre-event marketing, your focus will turn to maintaining awareness and boosting registration. Your email and social media messaging will likely become much more frequent. You can start to take advantage of some new techniques such as having leaders and event VIPs help you to promote the event via guest posts and social media. It may also be a good time to think about paid

promotion (e.g., social media campaigns, print advertising, etc.). Don't forget to promote major landmarks during this phase (e.g., early bird deadline).

4. **Last Call:** You don't want to forget about last-minute marketing tactics in the final days prior to your event. This might mean making phone calls to regular attendees missing from your guest list. Of course, you will likely still be utilizing email, social media and your event website. Eventbrite says that influencer marketing and attendee referrals can also be leveraged at this time.

MARKETING DURING THE EVENT

It's important to engage in promotional opportunities during your event if at all possible. Social media and online technology make this accessible. Appoint one or two volunteers who will manage your social media during this time, making sure to post regularly and to engage with anyone who tags your page. If you are using an event hashtag, consider sharing and reposting others participating in the tag. Photos can be especially engaging.

Video is another important tool to consider. You may choose to broadcast a portion (or even the entirety) of your event to show others what they are missing. You can also use video to capture attendees having fun or to promote other things that may be coming up at your event.

Promotion isn't just limited to social media, however. You should try your best to have members from the media at your event to ensure that you will get local news coverage. Invite people like newspaper writers, radio broadcasters, TV reporters and community bloggers to learn more about the cause you are supporting, get a behind-the-scenes look at the event, enjoy an exclusive interview with a club leader or keynote speaker – whatever angle works.

If your event is stretching over more than one day, you might also think about how you can use email to promote other functions at your event. This might come in the form of a daily recap e-newsletter, which talks about the highlights of the current day and what is to come.

POST-EVENT MARKETING

Marketing doesn't stop just because the event is over. Now is the time to brag about your successes and promote any other upcoming events.

Just like with marketing during the event, you will want to use a strong media mix. Disseminate a post-event press release to share any event wins such as the amount of money raised, key awareness messages or strong attendance figures. These are messages that you can also share on social media, in your club newsletter and as a conclusion update on your event website.

You can also repurpose content from your event to continue to market your club and/or cause for some time to come. Share photos, anecdotes, videos and longer content pieces as a way to keep your name out there.

A NOTE ON MARKETING VIRTUAL EVENTS

Hubspot offers a few additional tips for marketing online events. This includes being transparent about what audiences should expect with your event. Attendees need to understand what they will get when they register. Doing so means that you will attract the right attendees for your event. You can back this up by sending out subsequent emails and targeted social media messages that remind them why they signed up in the first place. Just make the purpose strong and clear.

The company also suggests that event marketers find ways to leverage brand partners. This can offer up some great free and in-kind opportunities. Ask those business and organizations affiliated with your event to promote the partnership on their marketing channels. You might even consider a lead-share agreement if appropriate.

THE EVENT WEBSITE

According to Cvent, an online event planning and marketing solution provider, there are two main types of websites associated with events: the registration website and the event website. The registration website is simply what the name suggests – a simple page that allows attendees to easily register for an event. It works best for small and low-barrier events or those that do not need much promotion. On the other hand, an event website is better for larger, attention-grabbing events, especially those that come with a higher price tag. This more detailed informational and promotional site will also include a linked registration page.

Whichever option you choose, Cvent notes that you will want to make sure that your website is responsive (think about computers, tablets, phones, etc.), branded to your event and/or organization, easily readable and accessible to all users. The site should give the planning team access to data, registrant information and any other controls and analytics they need for the event to be successful.

You will also want to make sure that your event's website includes all the necessary components. Cvent lists event name, purpose, time/date, location, cost, call to action and FAQs among the basic information that should be incorporated into every website. You will also need to think about design elements such as the URL itself, theme, tagline and color scheme.

In terms of site navigation, it's important that it is easy and accessible. Avoid using several dropdown menus, think about how it will look on various screens and make sure to test it with people outside the design and planning teams. Furthermore, Cvent recommends ensuring any key links, such as registration, are very prominent and available on every page. Event technology company Eventsforce agrees with the suggestion, going on to say that the event date and location should also be included above the fold on every subpage within your website (i.e., part of your website header).

Additional best practices from Eventsforce:

- **Be upfront.** You want visitors to your site to quickly understand what the event is about, when and where it will be held and how to register. The landing page needs to be something that grabs their attention.
- **Use strong visuals.** Images, graphics and videos should all have a prominent place on your site. Eventsforce suggests avoiding stock images of people meeting as well as boring photos such as individuals speaking at podiums or groups sitting in bland rooms.
- **Think about your font choices.** This simple decision "can indicate subtle hints about the personality of your event or organization," Eventsforce explains.
- **Color matters.** Many purchase decisions are made on the basis of color choice, a fact that extends to event registration. You want to make sure that your site's color scheme is attractive. It also needs to be readable. Dark font on light backgrounds tends to work best, especially if your audience includes users with limited vision.
- **Keep your registration process simple.** Forms should be clean and easy to use. Don't ask for information you don't need or won't use. The more burdensome the process, the more likely potential attendees are to walk away without completing the transaction.

ATTENDEE ENGAGEMENT

After months of careful planning, event day has finally arrived. While many people might think all that's left is to execute your fundraiser or meeting, the seasoned planner knows that there is still much work left to do with engagement. This includes communicating with attendees, ensuring audience interaction, bolstering meaningful connections, continuing event promotions and setting yourself up for future success.

PRE-EVENT COMMUNICATIONS

In those last days just before your event, you will want to make sure that you are communicating with your registrants so that they know what to expect and what to do. Regardless of whether the event is held onsite or online, attendees will want to know about the schedule, how to access their registration information, the code of conduct and any FAQs. It is also a great time to promote your sponsors and exhibitors if you have them.

For onsite meetings, you can provide them with additional information to help them navigate the event and host city. This includes things like dress code, significant weather announcements, things that they should bring with them and transportation/parking information. Hotel information, city highlights and local tours can also be helpful.

If the meeting is being held virtually, you will want to make sure your attendees have all of the information they need to access the session. This includes the event URL, logon instructions, troubleshooting tips and any other important technical details.

AUDIENCE ENGAGEMENT

Engaging with your attendees is another important step just before and on event day. The key here is to know what kind of information your audience needs and how you should deliver it to them. Email is a great way to share a lot of information at once, while social media works best for a constant steam of reminders, announcements and updates.

According to social media management platform Buffer, "Nearly as many people are talking about an event before the event as they are during." That's why it's so important to stay constantly engaged with your attendees. You want to be part of that conservation so that you can address concerns, answer questions and lead your registrants where you want them to go.

So, how do we best do this? Buffer says that quotes and multimedia posts are the most likely to capture your followers' attention. Things like teasing your speakers (make sure to tag them and use your event hashtag if you have one) or providing a photobooth or backdrop can get you the kind of engagement you're looking for at an event. You can also share behind-the-scenes photos, launch audience polls and stream Q&A sessions.

NETWORKING

In terms of audience engagement, networking is often the ultimate goal. Attendees want to interact with one another, and it is up to you as the event planner to facilitate opportunities and spaces for that to happen. In fact, according to event management technology firm Aventri, 82% of corporate attendees have networking as their top priority when going to an event. This far outranks other priorities including learning (71%), entertainment (38%) and self-improvement (37%).

This kind of connectivity is important in organizations like Sertoma because our attendees are often looking to be part of something bigger than themselves. They tend to seek out long-term, meaningful relationships.

Networking for your event can begin long before game day. Do you have a private online group for your members? If you don't have a group set up on Facebook or another virtual platform, consider building one around your event. Find ways to connect and excite attendees with engaging posts aimed at building up your community.

Onsite Networking Ideas

- Project-based workshops are popular at educational events. This helps attendees retain as much as 50% of the information once the event is over, according to ASAE. This connectivity solution becomes even more impactful when small groups of attendees work together to come up with solutions to real-world problems (90% information retention).
- Utilize your venue and its surroundings. If you are able to break up meeting locations throughout the event, ASAE says that you may benefit from new and different perspectives.
- Offer mid-session activities. Things like breakout groups, interactive polls and instant feedback get your attendees involved in the action and working with each other.
- Make it fun! Human bingo, competitive networking and conditional discounting from exhibitors are all proven tactics, according to Aventri.
- Find ways to engage first timers. If it is something like a regional convention or major club meeting, have your club leaders on hand to welcome and guide newbies.
- Include networking spaces. Beverage stations and social lounges are prime real estate for this. You can include icebreaker questions or a solution wall to help facilitate conversation further.

Virtual Networking Ideas

- Start your networking early! As soon as an attendee registers, offer them a networking space to meet other attendees, such as a Facebook group or other online forum.
- Kick off your event with an online happy hour or reception. Keep it casual, light and fun.
- Build in time for networking breakouts. You can predesign these opportunities by a host of demographics or simply allow attendees to gather naturally.
- Create a networking guide. Bizzabo Blog suggests providing quality content and tips to help your virtual attendees improve and make the most of gathering opportunities. The more personalized to your event you can be, the better.
- Spark a discussion on your online community.
- Find ways to engage before and after the event with additional content such as an attendees-only webinar or a curated conversation with key leadership or presenters.

TESTIMONIALS

Testimonials can be another great way to engage with your attendees. Not only are you ensuring that you are holding one-on-one conversations with those supporting your event, you are also setting your club up for future marketing opportunities.

Reviews play an important part in buying decisions. According to Eventzilla, an online event registration software provider, 91% of people read online reviews and 84% "trust reviews as much as a personal endorsement." Knowing this, it's easy to see why you want to make sure you are capturing the enthusiasm and words of praise from attendees.

Event-production company Temple Rock Productions offers four best practices for gathering your testimonials:

1. Seek out attendee testimonials during the event. This is true whether it is held online or in person. You can capture videos, pull quotes from evaluations, collect written comments and conduct feedback polls all while your guests are still focused on your event.
2. Medium matters. How will you use your testimonials? Let the answer to this question guide what kind of information you gather and how you get it.
3. Craft your message. Temple Rock suggests finding ways to "lead the witness" with a well-planned pitch. Word choice matters so the company advises using upbeat multiple-choice questions for best results.
4. Get permission. Make sure that individuals understand that you will be using their responses to publicly promote the event, now and in the future.

Once you have your testimonials, Eventzilla says you can use them to tell attendee stories through engaging online videos, promote guest satisfaction in your sponsorship sales collateral, offer recommendations on your event registration page, supplement promotional content in your email marketing and provide new messaging for paid advertising.

AFTER THE EVENT

Now that your event is finally over, there are still a few wrap-up activities left on your to-do list. This includes continuing to engage with your stakeholders, gathering feedback, following up with sponsors and holding a comprehensive event debrief. Working through these small details now can better set your club up for future plans.

SAYING THANK YOU

So much of what Sertoma clubs do rests upon strong relationships. Building and maintaining goodwill is incredibly important, and employing two little words – thank you – can go a long way in fostering these ongoing partnerships.

Why do we say thank you? We express our gratitude to demonstrate our appreciation for those who help make our work successful. Without their volunteerism, financial support and attendance, our events would simply not be possible. People want to know that they are appreciated.

Who do we thank? The truth is, your club should thank everyone involved in an event. That includes your planning team, event volunteers, attendees, sponsors, vendors, club leadership, speakers and more. There is a good chance you will want their support again in the future, so make sure that they know that you value their role in your event.

When do we thank them? Thanking your event stakeholders should happen pretty quickly after the conclusion of the event. Broader recognition of your club's appreciation should happen within 24-48 hours of the event, with more personalized thanks occurring within a week or so.

How do we say thank you? There are many different ways you can thank those associated with your event. Thanking attendees can take place on a general social media post. Club leadership can be thanked in person at a future meeting. Volunteers should receive a handwritten thank-

you card if possible. When thanking sponsors, you may consider sending a special note with any post-event reports. It is also a good idea to thank them via social media, making sure to tag their page for additional recognition.

FEEDBACK

We have already mentioned the importance of feedback a few different times throughout this guide. We know that gathering constructive criticism from stakeholders is important because it helps us understand what has gone right, what has gone wrong and what we can improve. Many planners will wait until an event is over to conduct a survey, but experience management company Qualtrics says that there are actually three key stages to gathering feedback.

PRE-EVENT FEEDBACK

The first phase of getting feedback occurs before the event. Work during this stage is typically focused solely on improving the attendee experience and helping planners make critical choices regarding the event. More specifically, Qualtrics says that pre-event feedback works best when used to:

- Boost excitement about the event
- Engage possible attendees
- Pinpoint areas of great interest
- Close the informational loop

Your club can use this time to do things like allow members to vote on speakers at club meetings (asking them to rank options works especially well) or test out possible event themes. However, Qualtrics cautions that while this information can aid planners in development, it should <u>not</u> drive all of the decision making.

MID-EVENT FEEDBACK

We talked earlier about how attendee engagement throughout your event can help you address issues as they arise. This continues to be true, and doing so helps you instantaneously improve the experience for attendees, sponsors and other stakeholders.

It's recommended that you have appointed individuals charged with monitoring and addressing these concerns as they arise. Empower your volunteers where and when possible, but also make sure that you have club and event leadership available to handle any significant issues.

Ways to collect feedback during the event:

- A "text" or email helpline where attendees can give feedback or ask questions.
- Onsite feedback stations where registrants can speak to someone and/or drop a comment card.
- QR Codes that take attendees to a simple online feedback form.

POST-EVENT FEEDBACK

After the event is when you'll focus on getting the information you need to improve on your next event. In fact, Qualtrics says that any feedback gathered during this stage should be used to either measure success or for future strategic planning.

For best results, it's recommended that a post-event survey go out within one or two days of the event. It should be short (10 questions or less) and have mostly close-ended questions that give you measurable data. The survey should also include at least one open-ended question so that respondents can leave additional comments not covered by other questions.

MemberClicks, a membership management software provider, provides these nine questions that your club may work from:

1. Overall, how would you rate the event?
2. How would you rate the following aspects of the event? (Options might include date/time of the event, location, speakers, sessions, food, vendors, etc.)
3. What did you like most about the event?
4. What did you like least about the event?
5. How do you think this event could have been improved?
6. Was this the first time you attended one of our events?
7. Based on your experience at this event, how likely are you to attend future events?
8. How likely are you to recommend our events to a friend/colleague?
9. Do you have any other suggestions or comments to help us improve our future events?

SPONSOR FOLLOW-UP

We briefly touched on the critical need to work with your sponsors after the event in the Sponsorship section of this guide, but we'll dive into this topic a little deeper here to help clubs better understand the importance of leaving a positive, lasting impression on these valuable event partners. The overarching goal is to retain sponsors for future events and other support opportunities.

There are many ways you can handle this part of your relationship with your sponsors, but Winspire, a nonprofit fundraising assistance firm, has put together a list of three that they think are best. The first is a post-event summary and thank-you letter combination, which we have already covered at length (see pages 25 and 38).

Next, it is suggested that your club look for free ways to promote sponsors after the event. One option we already mentioned was tagging sponsors in post-event social media posts. Your club might put together a video of clips from the event that includes a brief mention of each sponsor. You can also share photos of sponsors interacting with attendees. Winspire suggests finding ways to watermark sponsor logos in those photos for additional promotional coverage.

Finally, hold a special debrief with your sponsorship team. Use this time to talk about what worked well, what acquisition methods were successful and what types of companies/brands were a "natural fit." Look at sponsors individually to see who was most satisfied and who had issues. You can also review the rewards that did or didn't work. Don't forget to examine which sponsors are most likely to renew their support.

THE EVENT DEBRIEF

We have looked at gathering criticism from attendees and sponsors. Now, it's time to focus on getting the opinions of those who know the event best – your planning and volunteer teams. This is often best achieved through an event debrief. This honest and open feedback session is designed to help you analyze nearly every element of your event.

An event debrief should be held within a few days of the event's end. Plan to meet for 60 to 90 minutes, recommends Dutch events app company, Superevent. If your volunteer team is small, it's okay to invite everyone. In cases where you have a large number of volunteers, it may be better to only ask function leads (e.g., associated committee chairs, lead volunteers, etc.) to attend. If you choose to only have key leaders, make sure that they gather comments from their teams and consider also giving those volunteers a place to leave anonymous feedback.

Now, keep in mind, the point of the debrief is not to assign blame for what may have gone wrong. Instead, it is an open forum to constructively share what the group can improve upon for next time. Superevent suggests using a pre-established agenda to help guide the conversation and keep everyone on point.

A well-organized agenda most likely will start with reviewing the event as a whole and looking at key event goals. This can be a great time to examine event data such as attendance numbers, funds generated, sponsorship scoring and more.

The agenda also helps ensure that you give time to focus on all key areas – from registration and guest relations to marketing and speakers. During this time, the group should discuss if the function met its goal(s), what went well and what needs to be improved for next time. You'll find that many planning action items arise from these critical conversations. It's important to document these notes in an accessible place for next year's planning team.

CONCLUSION

And that's it! After months of planning, you've finally reached the end of the event planning process. From the earliest days of setting your goals to wrapping up your team debrief, your club has hopefully navigated the many steps necessary to hold a successful event.

However, your work likely isn't done. Event planning is often cyclical, meaning that you've already started on next year's festivities. We encourage you to use the lessons learned through your latest event and in this guide to continue to improve and grow.

We invite you to check out the many sources referenced in this guide. You can find a full list, including links, on the next page. You can also find additional manuals, trainings and informational resources from Sertoma in our online Member Center at members.sertoma.org.

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