

Building donor relationships



**FORMS**

Society Event Planning Document Template

PGB3-1501

**Viken Mikaelian, CEO, PlannedGiving.Com**

**Brian Sagrestano, JD, CFRE**

**Meredith Sossman, Esq, CFRE**

*Editorial Revisions by*

**Camilyn Leone, JD**

**Patrick O’Donnell**

Copyright 2018 © PlannedGiving.Com, Inc. All Rights Reserved.

Contents licensed only to the nonprofit who purchased it.

1288 Valley Forge Road, Unit 82, Phoenixville, PA 19460

🕿 800-490-7090 🖂 Success@PlannedGiving.Com

WEEKS 15-16

Your Legacy Society Stewardship Events

|  |  |
| --- | --- |
| **BACKGROUND** | The Keys to Making Your Event a Success |
|  | Planning Your Event |
|  | Selecting an Appropriate Venue |
|  | Time and Date |
|  | Event Stages |
|  | Menu |
|  | Room Set-Up |
|  | Invite |
|  | Give-Away Item |
|  | Program |
| **PROJECTS** | Plan Your Legacy Society Event |
| **DOCUMENTS** | PGB3-1501 – Legacy Society Event Planning Template |

**Time required:** 2 hours

**What it covers:** Creating outcomes-based stewardship events

**Why:** The next generations of donors want to know that their gifts will be put to good use, as they intend, and the only way to show them this is to highlight matured gifts at your events

**How to get it:** [www.PlannedGivinginaBox.Com/PGB3-1501](http://www.plannedgivinginabox.com/PGB3-1501)

BACKGROUND

Once you create a legacy society, you will need to host at least one event per year to show your appreciation to these donors. Note that this is **not a fundraising event**, it is a stewardship event. There should be *no solicitations* of any type, be it an outright ask, silent auction, annual appeal, etc. The purpose of the event is **to thank**. If you also ask, then it dilutes the appreciation you convey for what these donors have already done for you.

You will find that most of the attendees at your event will be older. This is a function both of the fact that older donors have more free time to attend such events, and that younger donors -- particularly Generation X -- does not find this type of event **enjoyable or interesting**. *Keep in mind the demographics of the people in the room and you’ll maximize your opportunities for success.*

**Keys to Making Your Event a Success**

* Hold it at a location where you can provide *real life examples* of the benefits that matured gifts have produced.
* It should be a luncheon event (even though your society will have individuals of many different ages, remember that the more senior folks will not want to fight rush hour traffic or drive in the dark).
* Offer valet parking.
* Schedule a speaker with a compelling message about the impact and outcomes of legacy gifts on your organization.

**Planning Your Event**

*Venue*

Selecting an appropriate venue will make your entire event run **more smoothly**.

First and foremost, make sure the venue can accommodate what is likely *an older constituency*. That means that there are handicap accessible ramps, a large number of bathrooms close by, adjacent or valet parking and it is simple to find. Always create outdoor and if needed, indoor **signs to direct people** to your event. Have **coat checking** if the event is at a time of year when people wear coats.

Ideally the venue will be a location where you can **showcase past planned gifts**, since we want to show the society members the good that has come from previous donors’ planned gifts. (This will cultivate your donors’ sense of “immortality” through their giving by suggesting you will honor them in the same way after they are gone.)

If you cannot pick a venue which can showcase past planned gifts, you can select an exclusive one which most people will never have gone to. They will be excited just to come and see the famous venue!

*I once hosted a legacy society luncheon at an arboretum. The guest speaker was the executive director. He put together a PowerPoint presentation which showed every garden at the arboretum and then shared with the audience each of* ***the planned gifts*** *that had funded them,* ***naming the donor*** *and explaining why the donor had selected that particular garden. The audience* ***loved the stories*** *of the donors and the pictures. At the end of the presentation, the executive director then hosted a* ***golf cart tour*** *of the arboretum, showing attendees each of the gardens he had previously described. The society members thought it was the best event we had ever hosted, because it showed legacy gifts in action and was readily accessible to them.*

*Time and Date*

Ideally you will schedule your event *a full year in advance*. This allows you to tell new and existing society members about it well ahead of time. (Since you will provide membership pins and certificates for new members at the event, you really want them to be there!). As soon as you set the date and time, put it on your website and any social media sites you offer. Send a “save the date” card and e-mail out at least three months ahead so that people put it on their calendars.

*Event Stages*

Your event should have several stages:

* There should be a **welcoming stage**, where attendees arrive, are issued name tags, coats hung, and they are directed to a social area to meet with other members as well as your guest speaker and board members. This social time will be **the most enjoyable** for most of your society members, so allow sufficient time for it. (For example, if you schedule the event for noon, do not start serving the actual lunch until 12:30 p.m.) If you expect an older audience, *chairs will be very important* for this part of the event.
* Allow people to visit at their dining tables for lunch **before starting the formal program.** Generally 20 minutes or so is enough to get the food out and for people to connect. Do not leave seating to chance -- assign seats instead (this enables you to place attractive name cards at each place). Be sure to put at least one **board or staff member** at each table with your donors. If you can put *beneficiaries of your service* (e.g. a scholarship student for a college society event) at each table, this adds great “outcomes” value.
* As dessert and coffee are served, the formal program can begin. It should not last **more than 20-30 minutes**. When the speakers have concluded, the event is over. For a noon event, the program likely will end by 1:30.

*Menu*

When setting up your menu, be sure there is **enough food** for the time of day of the event. If it is a lunch, you do not necessarily need *hors d’oeuvres*, but if it is dinner, you need *hors d’oeuvres* and a meal. Your menu should include vegetarian and non-fish options to accommodate your guests. Because this will likely be **an older group**, plated food with wait staff will work out better than a buffet. Most of these events include an open bar, even at lunch. Plan the program to accommodate this. The bar should remain open for the entire event. Note that because this is a thank you event, **guests should not be charged** to attend.

*Room Set Up*

Ahead of the event, **review the room and set up** to meet the needs of your guests. The venue should be able to help with typical room diagrams. You will likely need to order *a projector, podium and microphone*. Even the best speakers should **use the microphone** for this event, since the audience may have hearing difficulties. When possible, consider setting up the room so as few people as possible *have their backs to the podium*, as it can be awkward to turn a chair around.

*Invite*

As this is an important event, you should create an appropriate invite. Have it **printed on card stock** and mailed in a proper **envelope**.

Your invite list should include all members of the society and their family members. Since legacy gifts often impact inheritance for other family members, allow them to bring family to your event. Also include all of your Board members and senior leadership if they are not already members. Society members want access to your senior leadership, so putting them in the room for your event will show the importance of legacy gifts.

You can **follow up** the invite with *an e-mail* about three weeks later to prompt people who have not responded to encourage them to come. The week before the event, *call the remaining non-responders* to personally invite them. This should be done by a fundraiser or volunteer, **not secretarial staff**. If you reach the person, you want them to know that you personally really want them to attend. They will be impressed that you actually called them yourself.

The **day before** the event, consider having a group of volunteers call all of those who responded “yes” and *confirm their attendance*. That way you will limit the number of “no shows” and keep your food costs down.

*Give Away Item*

Attendees at these types of events have come to *expect* some type of give away item. It needs to be valuable enough to not appear cheap, but not so expensive that it appears you are wasting valuable resources. Ideally it will be **something that they can display** at home or in the office that has your name on it and will start a conversation about your charity. Make sure you give yourself enough preparation time to find the item, order it, have it personalized and delivered for the event. Remember, delicate objects can be both beautiful *and* easily broken. Nothing will put a crimp in your event like a give-away item that has gone smash. So keep “durability” among your criteria.

*Program*

No event is complete without an **effective and enjoyable** program. The program should not be long, but needs to include several key elements, including:

* Thanking donors for their legacy gifts
* Honoring members who died in the past year
* Sharing information about the outcomes created by past legacy gifts
* Inducting new members into the society.

**Thanks to donors** should be made by either the president or the board chair. Reading the list of those members who have passed can be completed by the chair of your society or a member of the board.

The guest speaker should be someone who can speak about the planned gift while connecting it to the venue of the event. If you could not find such a venue, then the speaker should be someone who can **inspire your audience** in less than ten minutes, and include *at least one legacy gift outcome story* in the process.

Induction of new members can be done by the president or board chair and yourself. Be sure to **have a photographer present** to memorialize the moment as you induct new members into your society. You can then send your new members framed photos of their induction to display in their homes or offices.

With the program complete**, thank your members** and end the event.

PROJECTS

**Project 13: Plan Your Legacy Society Event**

Download the legacy society event planning template at: [www.PlannedGivinginaBox.Com/PGB3-1501](http://www.plannedgivinginabox.com/PGB3-1501). It includes an information summary sheet and a basic planning timeline featuring the elements outlined herein.

As time goes on, you will find more creative ways to run your event and will *no longer need* these tools. But for now, it is **a good way to get started**. Remember, the more unique and memorable your event becomes, *the more people will talk about it* and **want to join** your society.

DOCUMENT PGB3-1501

Legacy Society Event Planning Template

**[LEGACY SOCIETY NAME]**

**ANNUAL LUNCHEON PLANNING DOCUMENT**

**Summary Information**

Date and Time of Event:

Venue:

Contact Person at Venue:

Number Attending:

Number Guaranteed: \_\_\_\_\_\_

**Planning Timeline**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Month 1** | **Month 2** | **Month 3** | **Month 4** | **Month 5** | **Month 6** |
| Select and Reserve Venue |  | Set Menu | Confirm Event; Set Up Valet Parking | Diagram Room Set Up and Order Projector, Podium, Microphone as Needed | Finalize All Details and Host Event |
| Set Date and Time; Advertise on Website and Social Media | Create “Save the Date” Card | Send “Save the Date” Card | Create Invite | Pull Mailing List and Mail Invite | Telephone Follow Up to all Non-Responders |
|  |  | Select Give-Away Item | Order Give-Away Item | Wrap or Prep Give-Away Item | Deliver Give-Away Items to Venue |
| Determine and Invite Guest Speaker(s) | Provide Guest Speaker with Any Required Research | Determine Sequence of Program | Draft Program Script | Deliver Final Program Script to Participants | Finalize Any Changes to Script |