

Leveraging Metrics to Improve Advancement Events

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Please find a list below of additional resources from the *Leveraging Metrics to Improve Advancement Events* webcast. If you wish to print only certain resources, you may click their respective links to jump directly to them in the packet.

Pre-Webcast Resources

1. **LTV-Calculation**– downloadable Excel file from this link:
<http://www.academicimpressions.com/preconference/01-ltv-calculation.xls>
2. **Event Resources** – *Pages 2-3* – includes such things as photo release verbiage, text for emails to attendees and non-attendees, post event survey questions for attendees and non-attendees
3. **Event Evaluation** – *Pages 4-7*
4. **Event Evaluation Form (Editable)**– downloadable Excel file from this link:
<http://www.academicimpressions.com/preconference/03-Event Evaluation.xls>
5. **Event Summary** – *Pages 8-9*

Leveraging Metrics to Improve Advancement Events Webcast Resources

EVENT RESOURCES

PHOTO RELEASE

The following verbiage should be posted at your event registration table or other entry point.

“Your entry to this event constitutes implied consent to be photographed and to have those photos published. Should you not like your photos to be released, please let someone at the registration table know.”

EVENT FOLLOW-UP RESOURCES

TEXT FOR EMAIL | ATTENDEE

Thank you so much for attending our recent XXXX event. It was wonderful seeing you DATE. Below please find a link to the photos from the event to share with your family and friends. In addition, we would welcome your feedback as we strive to improve our guest experience. Please click [HERE](#) for a link to a short, five-question survey.

Thank you,

TEXT FOR EMAIL | NON-ATTENDEE

We are so sorry you were unable to join us at our recent XXXX event. Below please find a link to the photos from the event so that you may experience the night through our attendee’s eyes. In addition, we would welcome your feedback as we strive to improve our events for all of our friends and family. Please click [HERE](#) for a link to a short, five-question survey.

Thank you,

POST-EVENT SURVEY | ATTENDEE

1. Overall how would you rate the event?
2. Based on your experience at this event, how likely are you to attend future events?
3. Please rate the following aspects of the event
 - a. Excellent Good Fair Poor
 - b. Scheduling and timing
 - c. Entertainment
 - d. Food and beverage
 - e. Parking and directions
 - f. Invitations and guest list
 - g. Choice of facility/venue
 - h. Cost and pricing

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4. What was your favorite part of the event?
5. Any other suggestions or comments to help us improve future event?

POST-EVENT SURVEY | NON-ATTENDEE

1. Why were you unable to attend XXX Event?
2. Would you rather attend events on or off campus?
3. In addition to events, how would you like to hear from us?
4. What types of events interest you the most?
5. What else would you like us to know so we may better serve you in the future?

Instructions ©Donor Relations Guru www.donorrelationsguru.com

A) Weighted Goals/Criteria Please mark a 10 in the weighted column for those 3 criteria that best reflect the top 3 pre-event goals. Please note the 10 is *not* an evaluation score like the 1-5 range. It provides weight to reflect the top 3 pre-event goals for the event.

B) Individual Criteria Evaluation For each criteria please mark the *score 1,2,3,4 or 5* in the appropriate column. Make any pertinent comments, suggestions, etc. for future event planning for criteria.

Foundation Event Evaluation		Not Met	Needs Improvement	Satisfactory	Above Average	Exceptional	Place an x for 3 of the top goals for event	
		1	2	3	4	5	10	
Criteria	Description	Place <u>number</u> in the box					Evaluation Score 1-5	Goal Wt
		1) Funds Raised Met Plan Goals	Net revenues, not gross, AND, include personnel time estimates in calculating expenses, along with in-kind supplies. Did the funds raised warrant an event of this magnitude, time, effort?					
<i>Comments</i>								
2) Event Growth	Has the event grown by an acceptable percentage each year?							
<i>Comments</i>								
3) Income to Expense Ratio	Remember to include personnel time and in-kind supplies							
<i>Comments</i>								
4) Volunteers	Do you have sufficient numbers of volunteers? Are they experienced volunteers who return each year and require little training or do you have to retrain a new set annually? Or does the burden fall to a few staff and board members for planning? Are staff and board members overwhelmed at the event and unable to interact with guests?							
<i>Comments</i>								

Foundation Event Evaluation

		Not Met	Needs Improvement	Satisfactory	Above Average	Exceptional	Place an x for 3 of the top goals for event
		1	2	3	4	5	10
5) Time spent on event is reasonable	Do you know how much time is spent by staff, board, and volunteers? Does the time necessary to prepare and conduct the event include long days, evenings, and weekends?						
<i>Comments</i>							
6) Staff Enthusiasm	Are staff enthusiastic about organizing the event? Do they think creatively about it and offer ideas to improve it event if it means more work or do they groan and procrastinate?						
<i>Comments</i>							
7) Board Enthusiasm	Do board members volunteer to help in the planning? Do they attend the event and actively participate?						
<i>Comments</i>							
8) Educational Opportunity	Does the event provide opportunity to educate and/or advocate about/for your programs and mission?						
<i>Comments</i>							
9) Connection to Mission	Is the theme of event suitable to your mission?						
<i>Comments</i>							
10) Opportunity for media/public awareness/attention	Does the media print announcements and/or press releases about the event? Does the media attend the event? Does the media report on the event and include information about your organization and mission						
<i>Comments</i>							
11) Stewardship Opportunity for Existing Donors	Does the event provide an opportunity to include your existing donors, connect with them, thank them, honor them, and/or recognize them?						

Foundation Event Evaluation		Not Met	Needs Improvement	Satisfactory	Above Average	Exceptional	Place an x for 3 of the top goals for event
		1	2	3	4	5	10
<i>Comments</i>							
12) Opportunity to Identify and Cultivate New Donors	Does your event provide an opportunity to identify potential new donors and do you capture their contact information? Does the event provide opportunity to follow-up with attendees?						
<i>Comments</i>							
13) Reaches Target Fundraising	Is the large majority of your attendees within your fundraising target group?						
<i>Comments</i>							
14) Opportunity for individuals to give regardless of attendance.	Does the event incorporate ways for individuals to donate even if they don't attend?						
<i>Comments</i>							
15) Opportunity to engage attendees in organization	Does the event provide opportunities and/or information about how attendees can become involved in the organization in other ways, such as volunteer, board, etc.						
<i>Comments</i>							
16) Opportunity for board members to connect with/thank	Do board members have opportunities to meet and talk (network) with guests?						
<i>Comments</i>							

Foundation Event Evaluation							Place an x for 3 of the top goals for event
		Not Met	Needs Improvement	Satisfactory	Above Average	Exceptional	10
17) Sponsorship Opportunities/Expenses Covered	Do you have capital to cover expenses up front? Do you have multiple sponsors or are you reliant on one or too few sponsors who could easily drop out?	1	2	3	4	5	10
<i>Comments</i>							
18) Energy and Enthusiasm following the event	Is staff, board, and volunteers excited about the event? Do they enjoy discussing it and debriefing? Or does everyone relish the thought that it is over and they don't have to think about it for a year? Does it unify your group?						
<i>Comments</i>							
19) Timing-Organizational and Relational	Does the event timeline fit well with other organizational activities and programs? Do you have enough time to organize the event? Does the event date fit well in regards to other fundraising events occurring in the community?						
<i>Comments</i>							
20) Generated Constituents	Does the event generate constituents as advocates for your mission (Those persons served by the business/or mission.) Does it generate testimonials? Advocates for future events?						
<i>Comments</i>							
21) Constituent Involvement	Are there opportunities to involve or include your clients or constituents in the planning for the event? What about participating in an event or attending the event?						
TOTALS	Composite Individual Ratings (Scale 21-105)	0	0	0	0	0	0
	Composite Weighted Rating of top 3 criteria (Scale 30-150)						0
	Total Event Score (Scale 51-255)						0

Ratings	1	2	3	4	5
Total number of individual scores for this event	0	0	0	0	0

EVENT SUMMARY

TO:

FROM:

DATE:

SUBJECT:

Event Date:

Event Name:

Event Location:

Total Invitations Mailed:

Expected Attendance:

Actual Attendance:

Invitations:

RSVPs:

Agenda/Script:

Program/Printed Items:

Catering:

Floral:

Rentals:

Gifts:

Entertainment:

Audio/Visual:

Parking:

Photographer:

Facilities:

Planning Committee:

Overall review: