



Event Planning Procedure

Step 1: Does the event require national support (any level)?

If your event meets one (or more) of the following criteria, it requires a conversation with the Events Team:

- A formal invitation is designed for mail/email
- Presentations are produced to show at the event (PPT, video, etc.) that require A/V
- There is a formal program with talking points/speeches
- Requires negotiating any vendor contracts – hotel, catering, valet, A/V, etc.
- A mission moment is requested
- 30 or more attendees are desired

What can a market do independently? ***Note that the Event Manager should still be informed of independent market events**

- Small lunches/dinners at restaurants
- Events without formal presentation
- Donor outings (hunting, ski day, etc.)
- Events that ACE is the beneficiary of (something a donor wants to do *for* ACE where we are not responsible for logistics)

Step 2: Request nationally supported event

If the event meets the criteria of a nationally supported event, make official event request by:

- Filling out Event Request Form
 - Follow mission moment request procedure (if applicable)
 - Follow communications request procedure (if applicable)

Step 3: Build plan and have an event!

The Event Manager will take the information provided in the Event Request Form and set a call with the MGO requesting the event to go over any specific questions/details. From there the Event Manager will determine next steps and create a plan of action to execute the event. Once all parties agree on the plan of action, each team moves forward.

Important notes:

- **EVERY event gets run through the Event Manager and Chief Development Officer at initial thought**
 - The Event Manager will provide logistical and scheduling insight while the CDO will provide insight on overall market strategy
- Early on, it must be determined who from the national team should attend for travel and scheduling purposes
- If a local person or company is hired to manage the logistics, THEN the Event Manager is the point person and must “sign off” the contractor and track progress as the event nears

Step 4: Set event location

If the event is to take place in an ACE supporter's home, the associated MGO is responsible for making the ask of that supporter. If an event is to take place at an external venue, the Event Manager will manage the process of securing the venue.

ACE is the expert on ACE Scholarships, and the host is an expert in their home. Hosting cocktail parties is a tricky balance between allowing us to do what we are good at (exposing ACE to major donors in a meaningful way) and respecting the host and their wishes.

The best way to help empower us to do what we do is to be intentional about our language.

Do this: Would you be willing to **allow ACE to host an event in your home?**

Don't do this: Would you host an ACE event in your home?

The key is to set the stage early that this is an ACE event. We absolutely will allow them to have feedback and want them excited and comfortable, but this is an ACE event.

Things we would ask of our hosts:

- Provided a list of preferred vendors (if they have them)
- Check the invite for accuracy
- To speak on behalf of ACE/work with Communications Team on talking points
- Guest recruitment

Things ACE would manage:

- Activities/entertainment (keynote speaker)
- Invitation Design and Guest Registration
- Vendor booking/management
- Speakers/presenters – vetting, talking points, event preparation
- Agenda Setting

Step 4a: Introduce Event Manager to Host so they may begin coordinating

When a donor opens their home for ACE it is the responsibility of ACE to build and manage the event considering the host's specific preferences. In the initial interaction between the host and the Events Team it is important to discuss preferred vendors, house rules, and host's goals and ideas for the event. This will be collected then managed by the Events Team. This reduces stress on the host, and allows ACE to maintain quality and branding of events. Please note that often times working with the host's house manager is most efficient.

ACE Events Team is responsible for:

- Vendor booking/management
 - All vendors including venue, catering, valet, etc.
- Activities/entertainment (keynote speaker)
- Invitations and guest registration
- Speakers/presenters – vetting, talking points, event preparation
- Agenda Setting
- Collateral printing
- Regular progress updates to host and State Director

Major Gift Officer is responsible for:

- Finding host for events AND communicating expectations for how ACE events are planned and run
- Securing a host committee (if applicable)
- Connecting the host and Event Manager. Ensuring the host is responsive to Events Team
- Attendance: Working with host, host committee, and donor base to create guest list and ensure the right people are in attendance for the event
 - For smaller market events the MGO is responsible for sending out emailed event invitations, reminders, and follow ups
- Agenda feedback: Providing feedback on the event agenda provided by the Events Manager. Specifically, what ACE supporters should speak in the program, and based on the relationship with them what they should specifically hit on
 - Make the ask of chosen ACE supporters to speak at the event
- Relationship management in assigned markets
- Being responsive to Events Team request to ensure event success



Event Planning Procedure

Event timelines:

Start planning 1 year – 6 months out: Major fundraising event (Annual Luncheon, Conference, Lobster Bake)

- Guest count is over 250
- Hotel or formal venue required
- Hired keynote speaker

Start planning 6 months – 4 months out: Annual major donor or board receptions (Fall cocktail, Board spring cocktail)

- Smaller markets who use cocktail receptions in lieu of major fundraising events
- Larger markets scheduled board events

Start planning 8 weeks – 6 weeks out: Smaller lunches/cocktails

Start planning around 6 weeks out: These should be smaller donor outings that wouldn't need national support