



What To Do With Events When Events
Are The Only Thing We Are Not Allowed
To Do...

Lessons Learned And The New Way
Forward

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Welcome



Michelle Casserly, CSEP

- Executive of Strategic Events
- Hackensack Meridian *Health* Foundation
- Neptune, NJ

Overview

This session will dive into:

- **STRATEGIES:** I'll share the innovative strategies our team used to keep on cultivating, engaging and fundraising with supporters when traditional in-person event models were put on hold during the pandemic.
- **THE PIVOT:** I will show you how we not only pivoted our fundraising events but were still able to advance major gift strategies and serve as key tools to cultivate and steward donors and prospects while increasing their connections with our organization and its mission; which was needed more than ever during the COVID-19 crisis.
- **THE FUTURE:** And then we will cover how to refocus events strategically as we adjust to the new normal and how we are taking forth these ideas as we design our fundraising program for post-pandemic engagement.

Agenda

1. Share the playbook
2. Tips and best practices
3. Strategic planning strategies
4. Commiserate ;) & Collaborate
5. Closing



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QUESTIONS?

Now's my time to
hear from you!



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EVENT PLANNER

Someone who does precision guesswork based on unreliable data by those of questionable knowledge.

See also *wizard, magician*

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Navigating Events in the Midst of COVID-19....



Event Pivot



**8 Major
Events**



**50+ Cultivation
Events**

Hosted **7 events** PRIOR to COVID

Pivoted **7 virtual events** + 1 in person event

Webinars/symposiums, ZERO virtual or hybrid experience

Our team's version

- It starts with a great team and trust from leadership!
- Per Coach K:
 - "There are five fundamental qualities that make every team great: communication, trust, collective responsibility, caring, and pride. I like to think of each as a separate finger on the first. Any one individually is important. But all of them together are unbeatable."



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Our first reaction admittedly...

it's okay not to be okay...at first!



Stakeholder Buy-in

- Having critical conversations early and often
- Internal – foundation and campus administration
- Then external chairs/leaders
- Then roll out to entire committee
- Keep in constant contact with vendors



Review Contracts and Invoices

- Without event expenses, all funds raise will exactly where they are needed most!
- Transparent reporting
- Refund or carry over
- Your vendors are (or should be!) your friends...and are likely hurting
- Offer complimentary virtual ads as act of goodwill
- Add vendors to your outreach emails so they can tune into program and share it



Set Go/No-go Dates

- 3-6-9-12 month contingency plan for each event
- Collaborate to determine on realistic execution plans
- Local, state and federal guidelines
- Network guidelines
- Aforementioned stakeholder opinions
- Postpone
- Once decisions are made - "sing off the same song sheet"



Fundraising Window

- Can we cover costs?
 - Particular concern with high overhead events like fireworks and golf
- Increased competition when we move off our traditional event dates
- Potential adverse impact for 2021/2022
- Are committee members willing and able to ask?
- Are vendors willing and able to give?





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“The work that you do each and every day is the only true way to improve and prepare yourself for what is to come. You cannot change the past, but you can influence the future by what you do today.”

John Wooden

Virtual & Hybrid are Here to Stay

- Congratulations, you are now (still) chief screenwriter!
- Tons of challenges communicating just what a virtual event was, settled on:
- We will host a program that donors can stream live to continue to raise funds for the highest priority need at CAMPUS. The program will include updates by campus leadership and physicians with videos and moments of gratitude for our #healthcareheroes.
- Think a longer, taped version of your in person program that will celebrate your cause and inspire donors.



Virtual and Hybrid are Here to Stay

- No barrier to entry - the more the merrier
- Creative amenities if you do charge
- On demand access fits everyone's schedule
- Need to take this into account while budgeting! BizBash recommends a best practice to budget 10-15% more for audio/visual services



Reach Out to Donors during Typical “Event” Times

- Keep fundraising mindfully
- Case for support is stronger than ever
- Revised mailers with envelope/inserts
- Emails with #healthcarehero photos
- Renewal calls with revised script
- Will need to be flexible and nimble - all year to help recoup losses





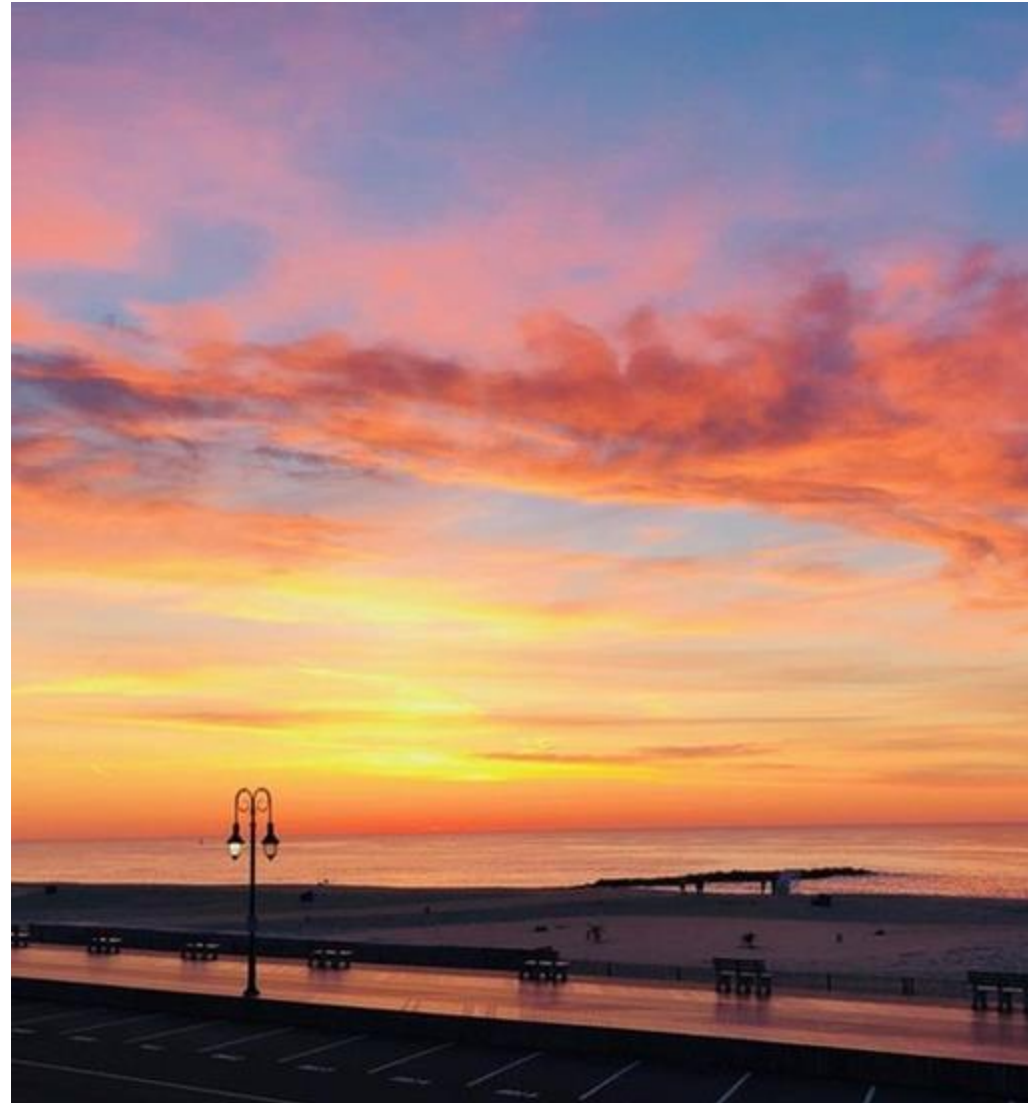
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**“When the winds of change blow,
some people build walls and
others build windmills!”**

Chinese Proverb

Sunset Considerations

- If not now, then when?!?
- Take a hard look at your events and start having conversations now about their future!
- Considerations for sun setting an event
 - Why am I having this event?
 - How much time does this event consume?
 - Does my event result in major donations?
- How to sunset an event
 - Courtesy of the pandemic
- Reallocating resources
 - Refocus talented event staff
 - Strategic reallocation of resources to other philanthropic efforts



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 Hackensack Meridian
Ocean Medical Center
Foundation | Giving
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— 30TH ANNUAL —
VIRTUAL GOLF CLASSIC

Raritan Bay Medical Center Foundation

Reception

Friday, May 1, 2020
6:30 p.m. – 10:30 p.m.

 Hackensack Meridian
Bayshore Medical Center
Foundation | Giving
Heals[®]

OKTOBERFEST

COMMUNITY CELEBRATION

THURSDAY, OCTOBER 29

VIRTUAL EVENT WILL AIR AT 7 P.M.
AT
HACKENSACKMERICANHEALTH.ORG/SMCVIRTUAL EVENT

VIRTUAL IN ACTION





CIRCLE OF COMPASSION

VIRTUAL CELEBRATION

New Opportunities

- Virtual tours and project updates
- Check in calls with leaders
- Cultivation and Stewardship opportunities
- (all things virtual!)
- Wine tastings
- Mixology course
- Cooking demo
- Book club
- Performances
- Beam signs / topping off ceremonies



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QUESTIONS?

Now's my time to
hear from you!



What key tenets can ground us as we return to “normal”?

**#meetingprofs when live events
finally come back**



Evaluating Event Success Then vs. Now

- Then
 - \$\$\$\$
 - # donors
 - Good time had by all?
- Now
 - Amount raised through event AND potential major gifts
 - Hitting budget goal which is part of the bigger picture
 - Quality of attendees
 - Advancing mission and message
 - Meaningful conversations

Pathway for Donors - Tracking Moves

- Developed a system to track moves and constantly refining it
 - Use of RE and RE Event Module
- Moves Goal - Strategic engagement at an event, results in a move in the prospect pipeline
 - Definition: Number of moves that result from fundraising, cultivation, stewardship and/or recognition events
- Efforts including but not limited to:
 - Conduct pre and post event meetings
 - Communicate constantly with development team
 - Infuse our mission in event execution
 - Sharing of open, planned and closed solicitations

Be Mission Focused in Planning and Execution



Be Mission Focused in Planning and Execution

On behalf of the patients at K. Hovnanian Children's Hospital,
we thank you for your support!



To learn more about how **YOU** can make a difference in the lives of the youngest patients in our community, please contact Jackie Lang by phone at 732.751.5134, by e-mail at jmlang@meridianhealth.com or visit www.khovnanianchildrenshospital.com/KHCH/waysstogive/



Getting the right people to the party...or Infinity War



Cultivation, Stewardship and Recognition Events





**THANK
YOU!**

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“Most of the time change is a good thing and I think that's what it's all about – embracing change, being brave, doing whatever you have to so everyone in your life can move forward with theirs and maybe it's the only way you can truly make her be happy.”

Coach Ted Lasso

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“YOU KNOW WHAT THE
HAPPIEST ANIMAL ON
EARTH IS?
IT’S A GOLDFISH.
YOU KNOW WHY? GOT A
10-SECOND MEMORY.
BE A GOLDFISH, SAM.”
- Ted Lasso



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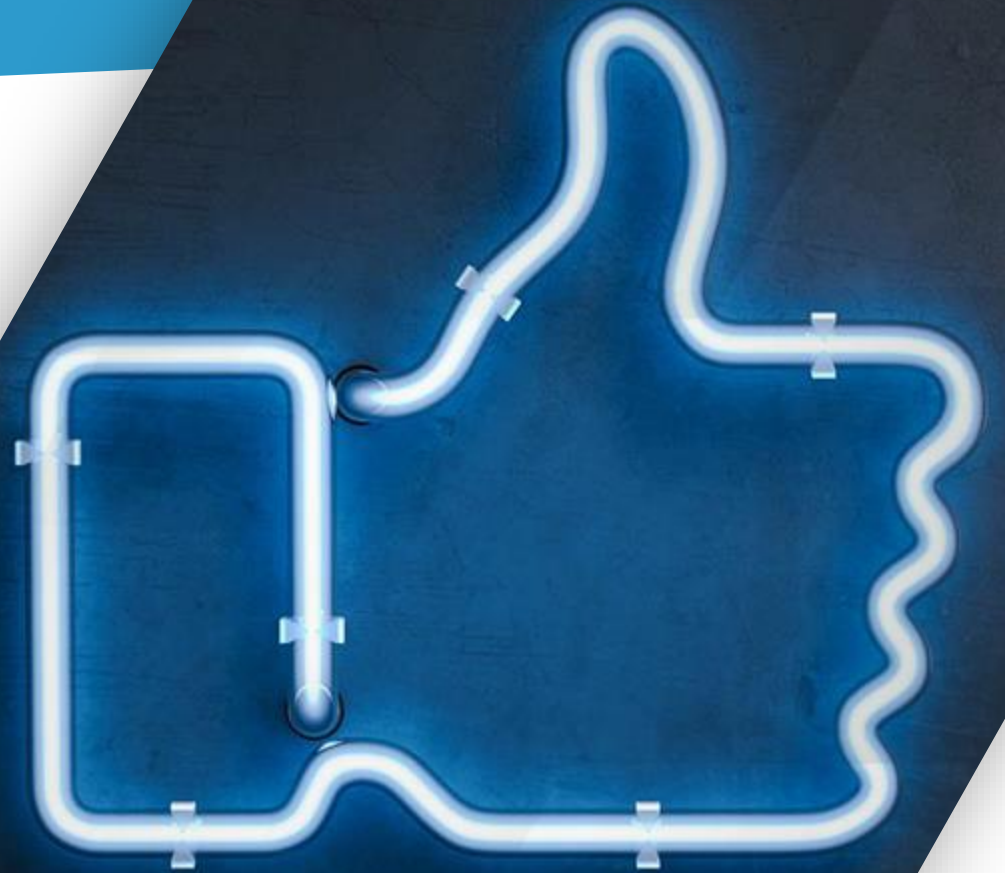
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