

Classy

Event Stewardship: Converting Attendees to Loyal Donors

Date

May 2023

Presenter

Sarah, Classy Coaching



Housekeeping Items:

- Keep an eye out for the follow up email after this training, it will contain:
 - The **recording** of this training
 - A copy of the **slide deck**
- Feel free to drop your questions in the **Q&A** section - it will be monitored by our team
- Share tips, comments and successes with each other in the **chat**



Introductions

Meet your Classy Coach

Roca



Sarah Gruber

- Background in Education
- passionate about helping you succeed!
- Born and raised in Santa Cruz, currently living in San Diego.

This presentation, together with all documentation, text, ideas, images, video, content, methodologies, tools, creative, and other materials prepared by Classy, Inc. ("Classy") are confidential and proprietary information of Classy and/or its affiliated entities and licensors (together, the "Materials"). The Materials are being shared for presentation purposes only. Classy does not make any representations or warranties about the Materials, and they are provided on an "as is" basis. You may not publish, reproduce, distribute, copy, display, share, use, or rely upon the Materials. Classy disclaims all liability to you or any other party should the Materials be published, reproduced, distributed, copied, displayed, shared, used, or relied upon. The Materials may describe strategy and possible future developments that may or may not be undertaken by Classy and may be changed by Classy at any time, for any or no reason without notice. This document is for informational purposes and does not create any commitment on behalf of Classy.

Agenda

- 01 Post-Event Wrap Up
- 02 Stewardship Strategy
- 03 Stewardship Value
- 04 Segmenting Attendees
- 05 Thank You Email Breakdown
- 06 The Extra Mile

Post-Event Wrap Up

Post-Event Wrap Up

Debrief Stakeholders

Who:

- Staff
- Board Members
- Volunteers

What:

- Objectives
- Attendance
- Feedback
- Financials
- Impact
- Recognitions
- Lessons learned
- Future plans
- Role
- Celebrations

Track Metrics

Who:

Internal Teams

What:

- Attendance
- Engagement
- Fundraising
- Sponsorship
- Social Media
- Media Coverage
- Volunteer engagement
- Impact

Looking Forward

Who:

Internal Teams

What:

- Budgeting
- Venue
- Event Theme
- Sponsors and Partners
- Marketing and Promotion
- Volunteer recruitment
- Timeline

Stewardship Strategy

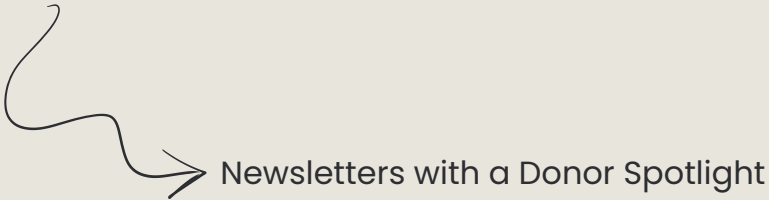
Opportunities

Acknowledgment

Recognition

Reporting

Ongoing Engagement



Mobilize and Empower the World for Good



Opportunities

Acknowledgment

Recognition

Reporting

Ongoing Engagement



Impact Reports

Mobilize and Empower the World for Good



Opportunities

Acknowledgment

Recognition

Reporting

Ongoing Engagement

Mobilize and Empower the World for Good

Donor Surveys
Event Invitations



Event Stewardship

Acknowledgment

Recognition

Reporting

Ongoing Engagement



Thank you (Emails + Calls)

Welcome (Emails + Letters)

Event Stewardship

Acknowledgment

Recognition

Reporting

Ongoing Engagement



Thank you (Emails + Calls)

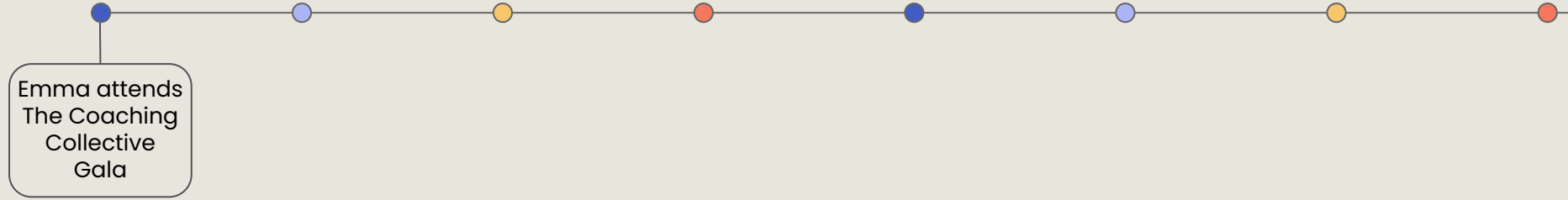
Welcome (Emails + Letters)

Stewardship Value

Donor Journey



Meet Emma!



Donor Journey



Meet Emma!



At the Gala, Emma learns all about the impact The Coaching Collective has on her local community. She decides to contribute during their paddle raise event.

Donor Journey



Meet Emma!



After the event, Emma receives the Thank You email from The Coaching Collective team.

Over the next few months, Emma continues to receive emails.

Donor Journey



Meet Emma!



In The Coaching Collective's quarterly newsletter, Emma sees they are running an appeal and decides to donate.

Donor Journey



Meet Emma!



As she continues to receive communication from the organization, Emma starts to follow them on social media.

Donor Journey



Meet Emma!

In December, Emma decides to become a member of "Coaches Corner", the recurring donor club during the End of Year appeal.

Donor Journey



Meet Emma!



In celebration of their recurring donors, The Coaching Collective gives Emma 2 free tickets to their next event.

Donor Journey



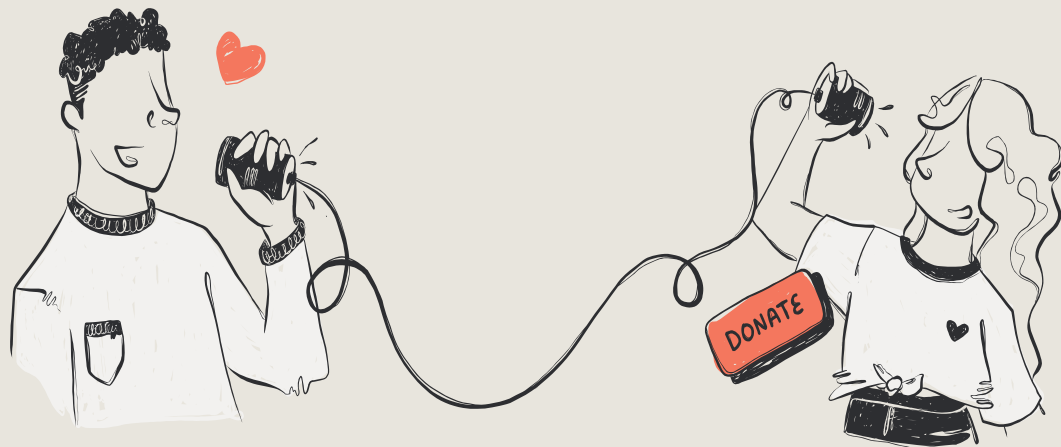
Meet Emma!



Emma decides to become a fundraiser to celebrate her 34th birthday. She raises \$1,000 for her favorite nonprofit - The Coaching Collective.

Data

- ✓ Builds relationships with donors + supporters
- ✓ Increases donor retention
- ✓ Generates revenue
- ✓ Raises awareness
- ✓ Enhances reputation
- ✓ Provides feedback



Data

Donors who had an excellent event experience are more likely to take the following actions.

51%

attend future fundraising events held by the organization

44%

look for more ways to support the organization hosting the event

33%

fundraise on behalf of the organization

Segmenting Attendees

Levels

- Turn donors into lifelong supporters
- Don't fall into the 'one-size fits all' stewardship approach!
- Segment your donors and create different strategies

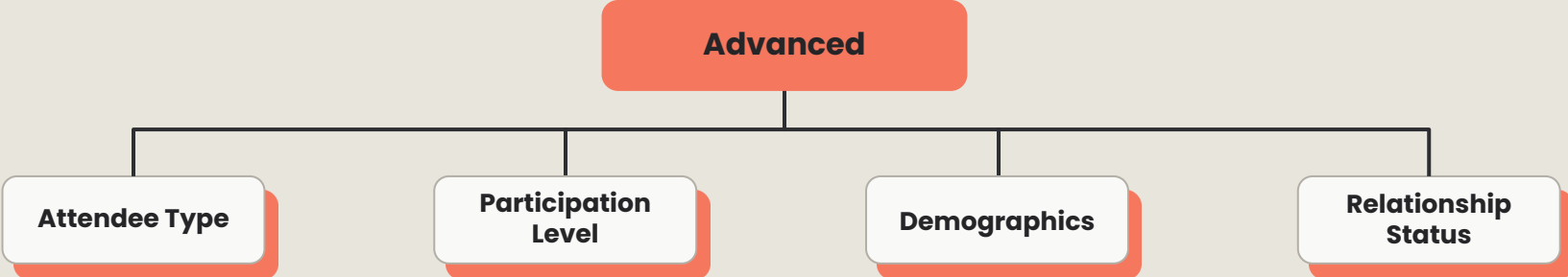
Foundational

Advanced

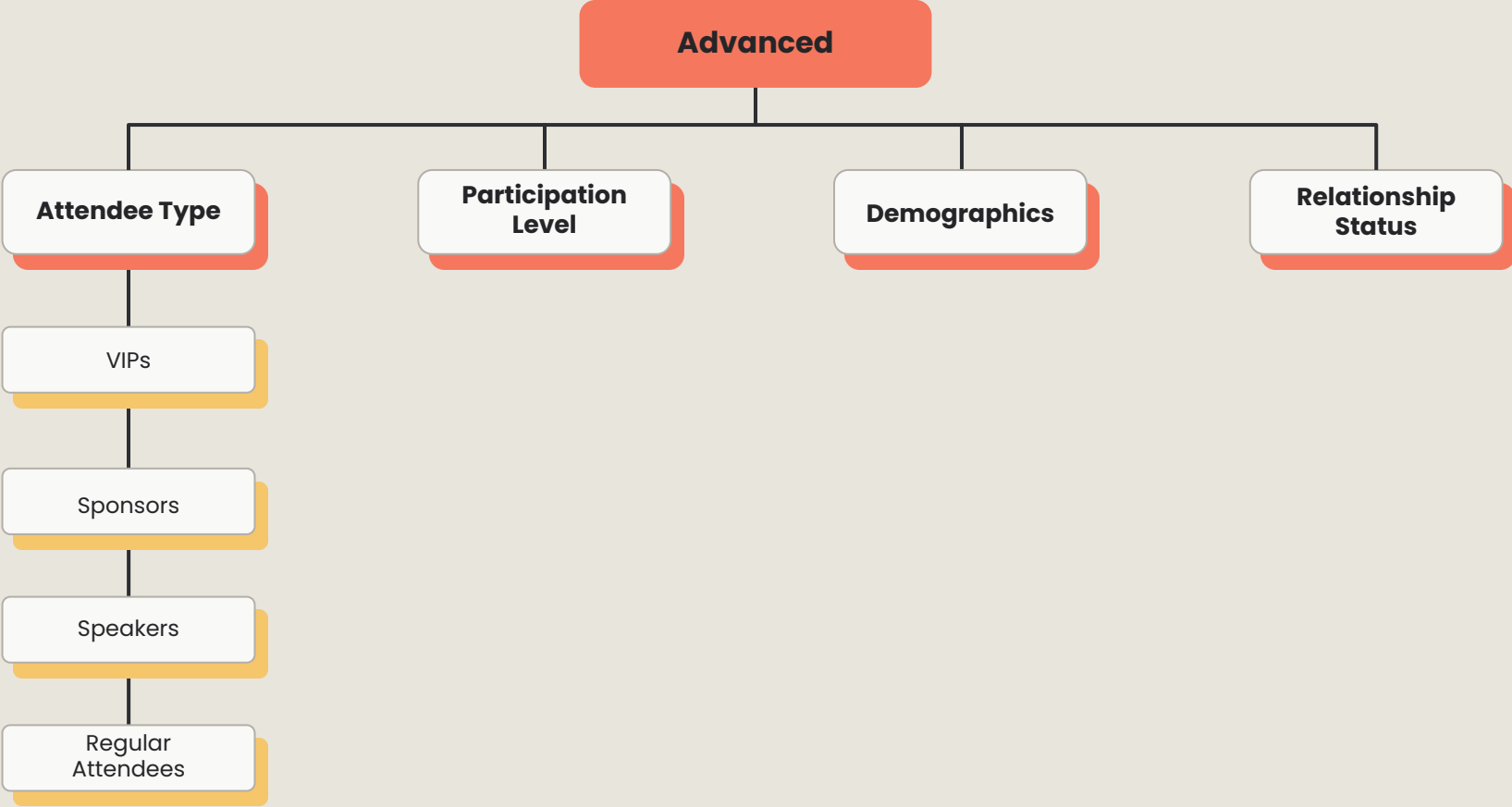
Segmenting Attendees



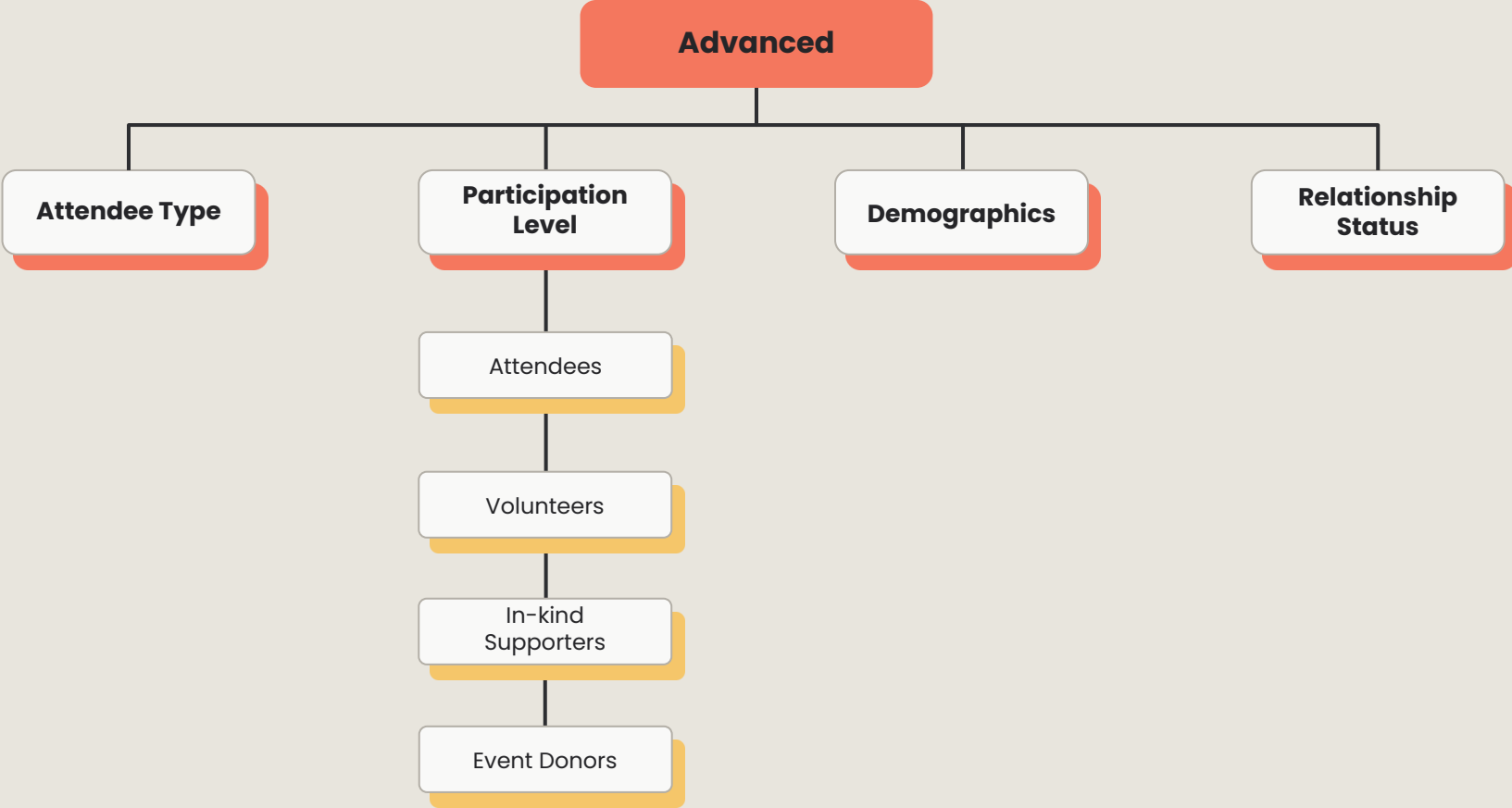
Segmenting Attendees



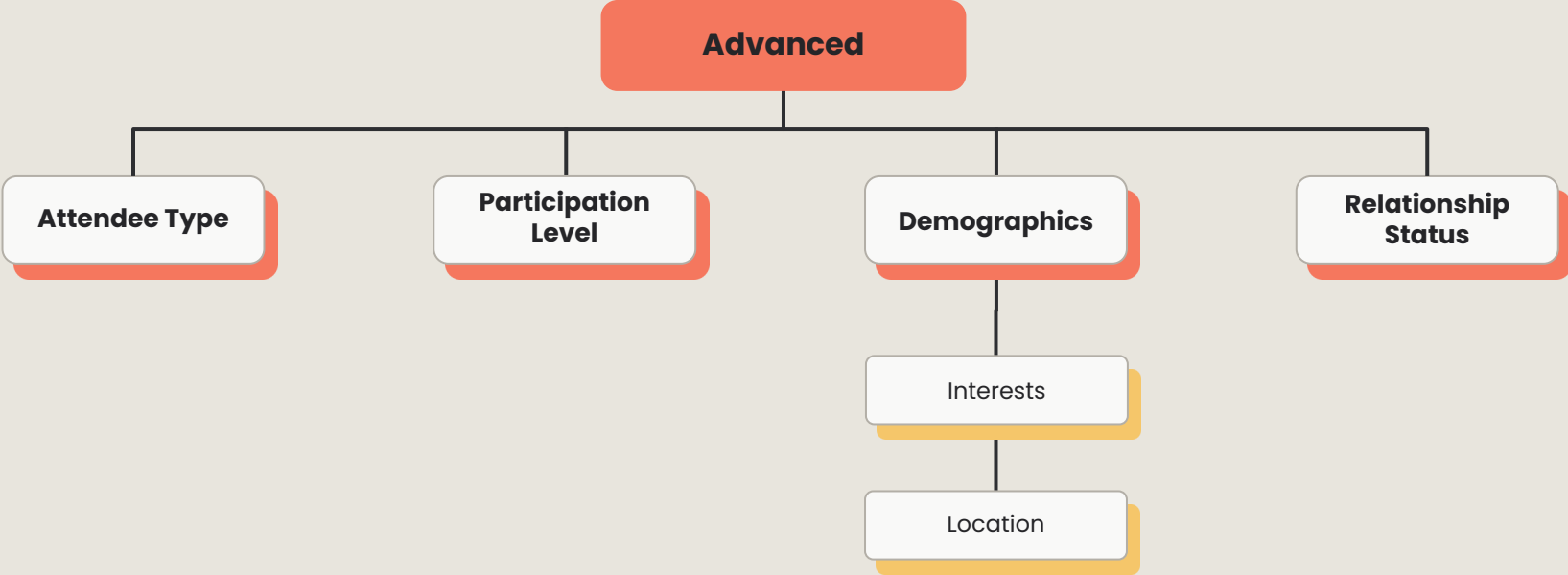
Segmenting Attendees



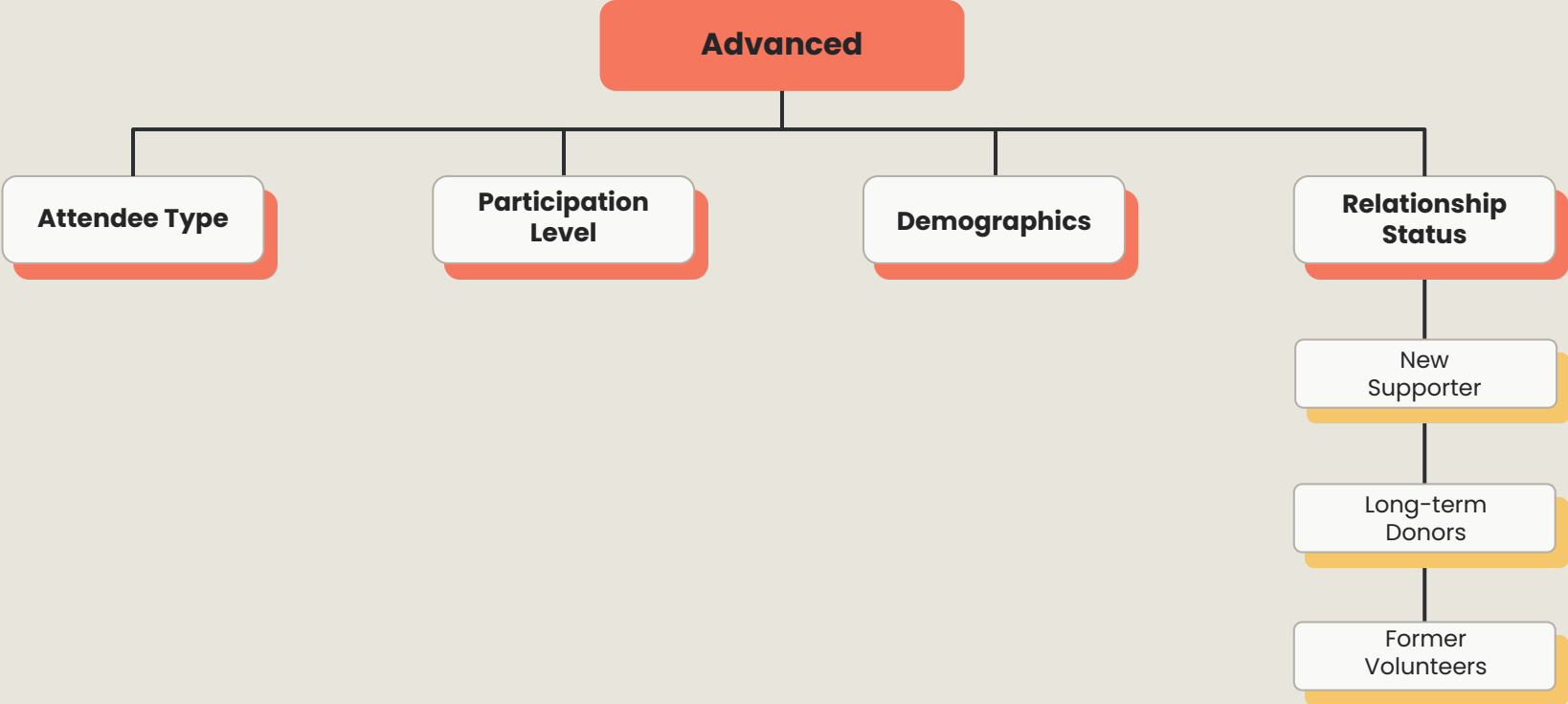
Segmenting Attendees



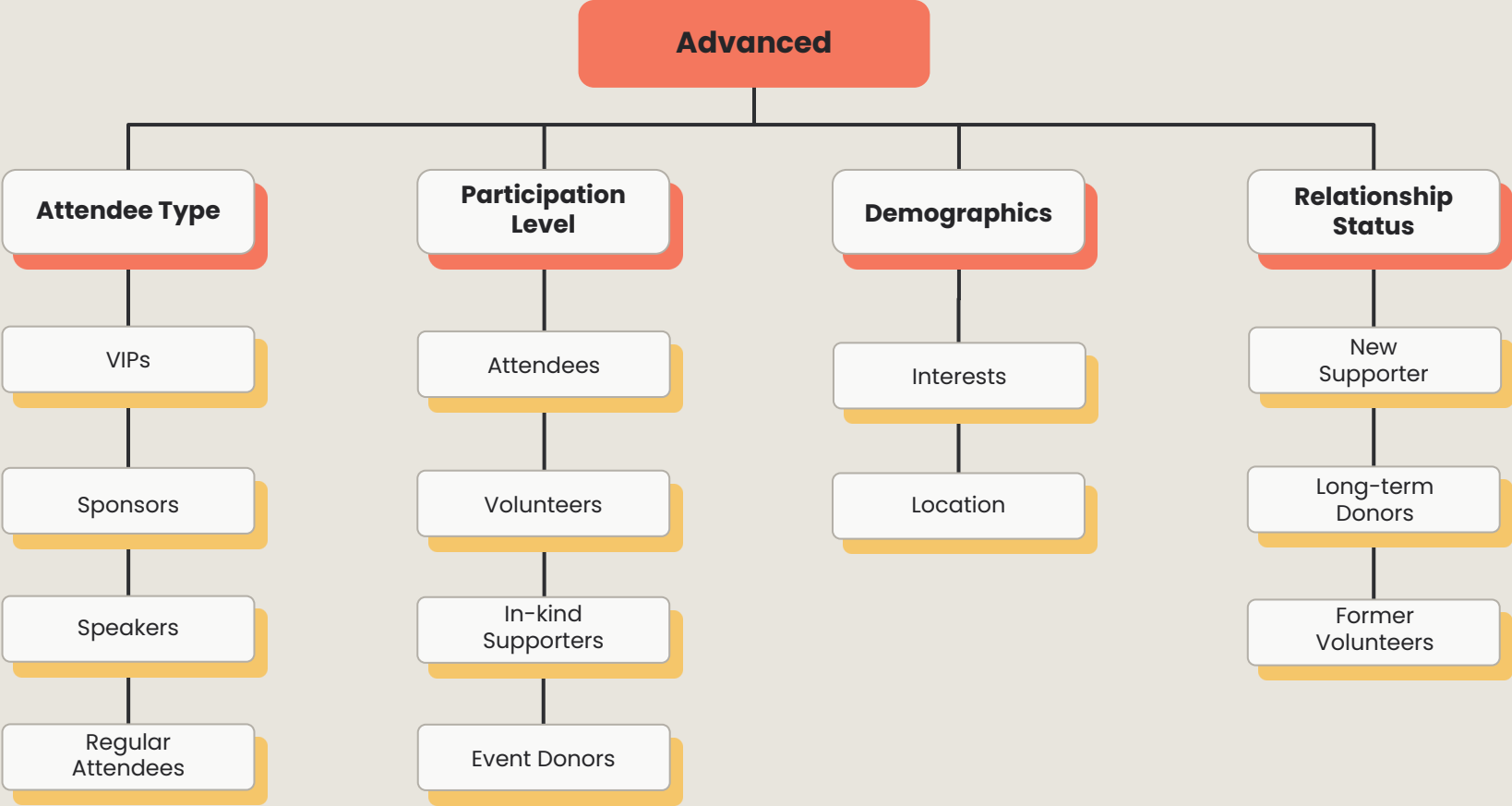
Segmenting Attendees



Segmenting Attendees



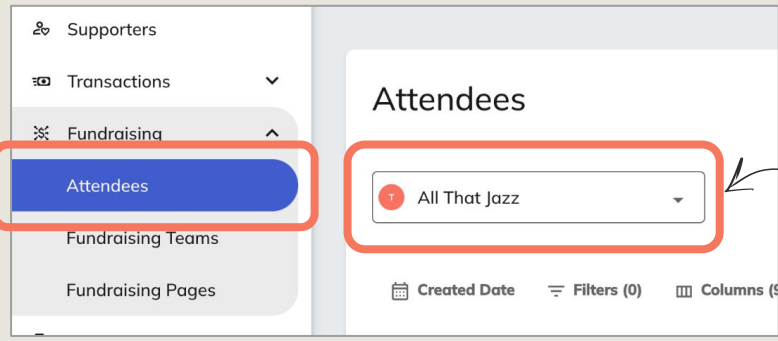
Segmenting Attendees



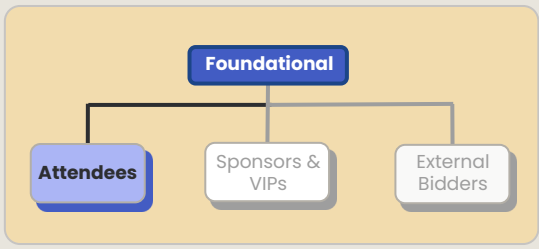
Reporting

Attendees

Classy
"Attendees"
Report



Filter by
Campaign
Name
(Event)



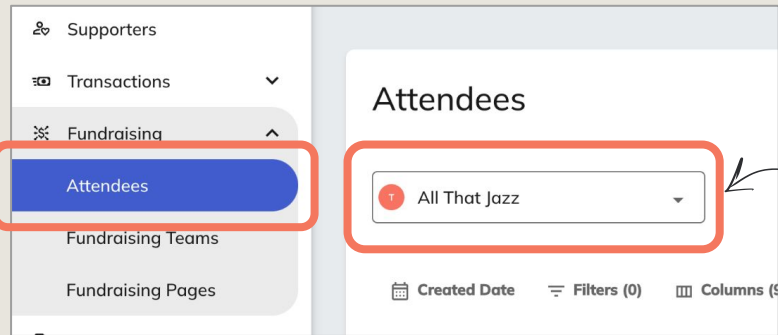
Sort by
"Attendee [First/Last] Name"

Attendee ID	Attendee First Name ↑	Attendee Last Name	Ticket Name
10691073	Abe	Chen	Virtual Ticket
10691122	Allison	Bishop	Gold Sponsorship
10691072	Austin	McKinley	Virtual Ticket
10561703	Brad	Cain	Silver Sponsorship

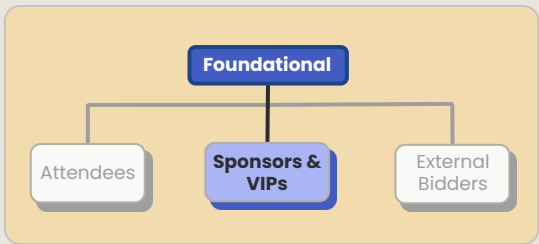
Reporting

Sponsors/VIPs

Classy
"Attendees"
Report

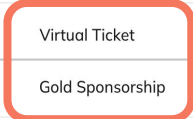


Filter by
Campaign
Name
(Event)



Attendee ID ↓	Attendee First Name	Attendee Last Name	Ticket Name
10561703	Brad	Cain	Silver Sponsorship
10561702	Sean	Robinson	Silver Sponsorship
10691078	Roca	Gruber	Virtual Ticket
10691076	Phoebe	Drammissi	Virtual Ticket
10691075	Frank	Drammissi	Virtual Ticket
10691123	Ferguson	Bishop	Gold Sponsorship
10691122	Allison	Bishop	Gold Sponsorship
10691121	Nicholas	Miller	Gold Sponsorship

Sort by
"Ticket Name"

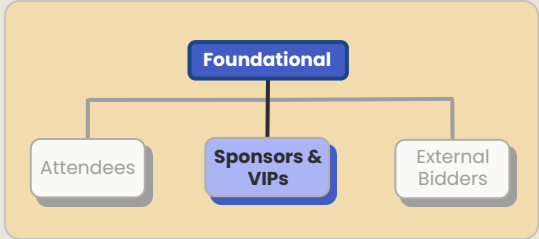


Segmenting Attendees

Reporting

Sponsors/VIPs

Classy
"Transaction History"
Report



Supporters

Transactions

Transaction History

Recurring Giving Plans

Payouts

Fundraising

General Reports

Transaction History

All That Jazz

Transaction Date Filters (0) Columns (10)

Average Transaction Size Total Transactions

Filter by
Campaign
Name
(Event)

Gross Transaction A...	Transaction Type ↑
\$250.00	Donation
\$500.00	Donation
\$150.00	Good
\$150.00	Offline Donation
\$10,000.00	Offline Donation
\$0.00	Registration
\$0.00	Registration

Sort by
"Gross Transaction Amount"

Amount and
Transaction Type
will be viewable

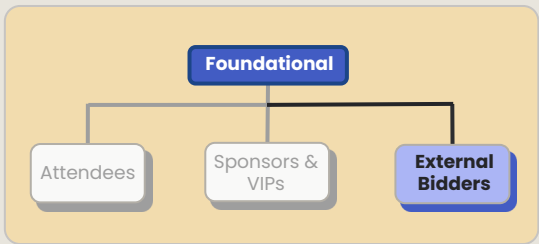


[Learn how to use index matching to combine 2 Classy reports to see VIP attendees](#)

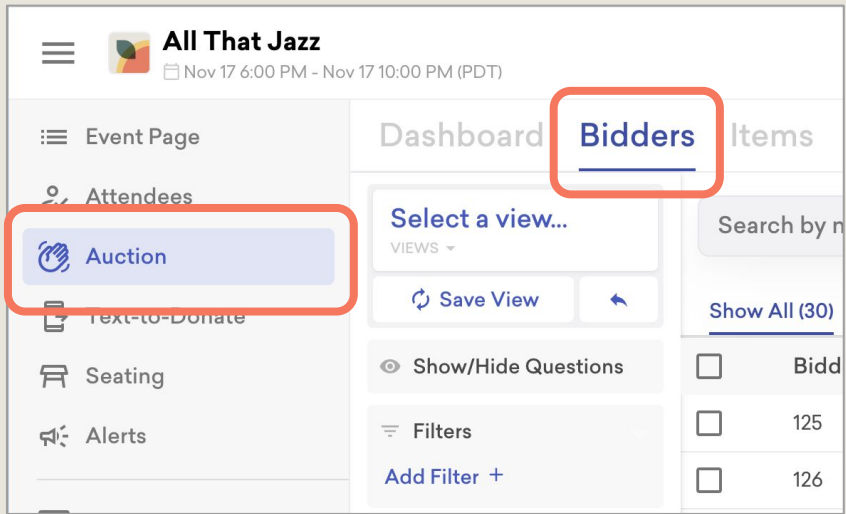
Segmenting Attendees

Reporting

People who interacted with your auction as external bidders



Classy Live Auction "Bidders" Report



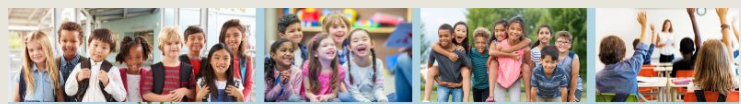
<input type="checkbox"/>	<u>Show All (30)</u>	No Bids (25)	Has Bids (5)	Unpaid (5)	Paid (2)
<input type="checkbox"/>	Bidder #	First Name	Last Name	External Bidder	
<input type="checkbox"/>	125	Nicholas	Drammissi	No	
<input type="checkbox"/>	126	Emily	Herrin	No	
<input type="checkbox"/>	127	Miko	Catz	No	
<input type="checkbox"/>	128	Elton	John	No	
<input type="checkbox"/>	129	Camden	Fox	Yes	

Filter by "External Bidder" status

Thank You Email Breakdown

Basic Content

- Thank You Message
- Event Recap
- Impact Statement
- Acknowledgement of Sponsors
- Call to Action + Next Steps



Thank you!

Dear Sarah,

I wanted to take a moment to personally thank you for your incredible support at our Coaching Collective Gala! Your attendance and generous donations made a significant impact and helped us take one step closer towards our mission of providing equitable education to underserved communities.

The gala was a magical evening filled with heartwarming moments and unforgettable memories. We were honored to have Dr. Rachele Aidala as our keynote speaker, and her speech was an inspiring reminder of the transformative power of education. It was amazing to see so many like-minded individuals come together to support our cause and make a positive difference in the lives of those who need it most.

Thanks to your contributions and the support of our sponsors and partners, we were able to raise over \$100,000 to support our programs and initiatives. These funds will enable us to provide educational resources and coaching to underprivileged students and communities, empowering them to achieve their full potential.

I would like to take a moment to acknowledge and thank our sponsors and partners, Shanna Birky Productions, Inc. and Haeyoung & Co., for their unwavering support and commitment to our mission.

We couldn't have done it without you! Your continued support and advocacy for the Coaching Collective are deeply appreciated. We invite you to stay connected with us by sharing our mission with your friends and colleagues during our Month of Giving campaign. Every contribution, big or small, can make a meaningful impact.

Again, thank you from the bottom of our hearts for your support. We look forward to collaborating with you in the future and making a real difference in the world.

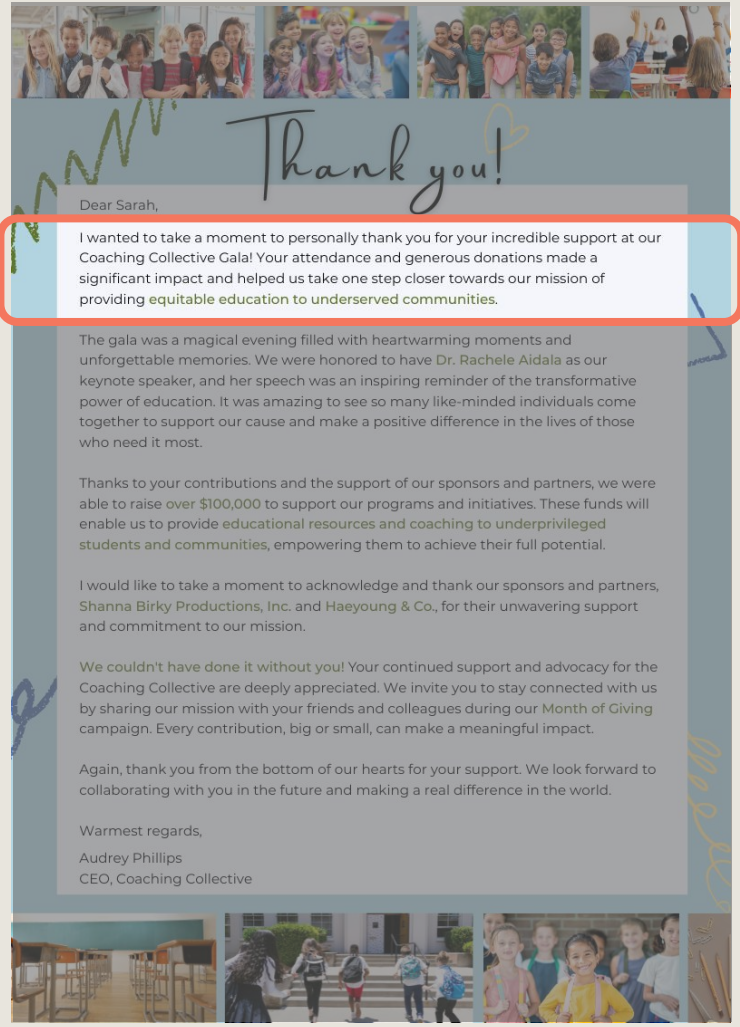
Warmest regards,
Audrey Phillips
CEO, Coaching Collective



Basic Content

Mobilize and Empower the World for Good

- Thank You Message
- Event Recap
- Impact Statement
- Acknowledgement of Sponsors
- Call-to-action + Next Steps



Thank you!

Dear Sarah,

I wanted to take a moment to personally thank you for your incredible support at our Coaching Collective Gala! Your attendance and generous donations made a significant impact and helped us take one step closer towards our mission of providing equitable education to underserved communities.

The gala was a magical evening filled with heartwarming moments and unforgettable memories. We were honored to have Dr. Rachele Aidala as our keynote speaker, and her speech was an inspiring reminder of the transformative power of education. It was amazing to see so many like-minded individuals come together to support our cause and make a positive difference in the lives of those who need it most.

Thanks to your contributions and the support of our sponsors and partners, we were able to raise over \$100,000 to support our programs and initiatives. These funds will enable us to provide educational resources and coaching to underprivileged students and communities, empowering them to achieve their full potential.

I would like to take a moment to acknowledge and thank our sponsors and partners, Shanna Birky Productions, Inc. and Haeyoung & Co., for their unwavering support and commitment to our mission.

We couldn't have done it without you! Your continued support and advocacy for the Coaching Collective are deeply appreciated. We invite you to stay connected with us by sharing our mission with your friends and colleagues during our Month of Giving campaign. Every contribution, big or small, can make a meaningful impact.

Again, thank you from the bottom of our hearts for your support. We look forward to collaborating with you in the future and making a real difference in the world.

Warmest regards,
Audrey Phillips
CEO, Coaching Collective

Basic Content

Mobilize and Empower the World for Good

- Thank You Message
- **Event Recap**
- Impact Statement
- Acknowledgement of Sponsors
- Call-to-action + Next Steps



Thank you!

Dear Sarah,

I wanted to take a moment to personally thank you for your incredible support at our Coaching Collective Gala! Your attendance and generous donations made a significant impact and helped us take one step closer towards our mission of providing equitable education to underserved communities.

The gala was a magical evening filled with heartwarming moments and unforgettable memories. We were honored to have **Dr. Rachele Aidala** as our keynote speaker, and her speech was an inspiring reminder of the transformative power of education. It was amazing to see so many like-minded individuals come together to support our cause and make a positive difference in the lives of those who need it most.

Thanks to your contributions and the support of our sponsors and partners, we were able to raise over \$100,000 to support our programs and initiatives. These funds will enable us to provide educational resources and coaching to underprivileged students and communities, empowering them to achieve their full potential.

I would like to take a moment to acknowledge and thank our sponsors and partners, Shanna Birky Productions, Inc. and Haeyoung & Co., for their unwavering support and commitment to our mission.

We couldn't have done it without you! Your continued support and advocacy for the Coaching Collective are deeply appreciated. We invite you to stay connected with us by sharing our mission with your friends and colleagues during our Month of Giving campaign. Every contribution, big or small, can make a meaningful impact.

Again, thank you from the bottom of our hearts for your support. We look forward to collaborating with you in the future and making a real difference in the world.

Warmest regards,
Audrey Phillips
CEO, Coaching Collective

Basic Content

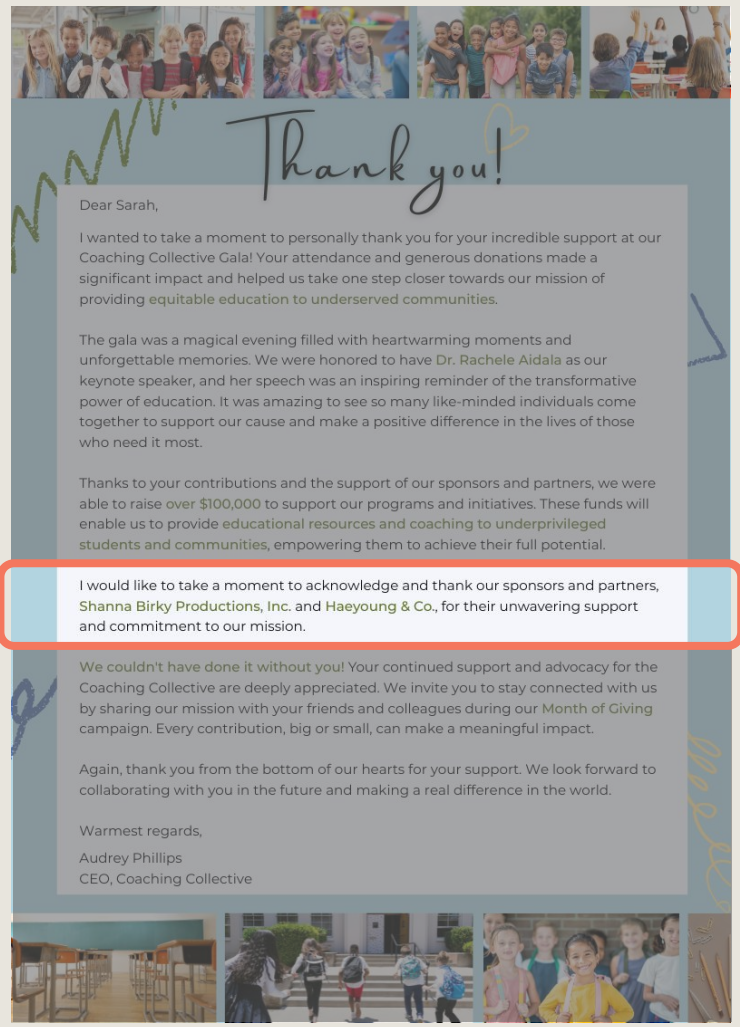
- Thank You Message
- Event Recap
- **Impact Statement**
- Acknowledgement of Sponsors
- Call-to-action + Next Steps



Basic Content

Mobilize and Empower the World for Good

- Thank You Message
- Event Recap
- Impact Statement
- **Acknowledgement of Sponsors**
- Call-to-action + Next Steps



Thank you!

Dear Sarah,

I wanted to take a moment to personally thank you for your incredible support at our Coaching Collective Gala! Your attendance and generous donations made a significant impact and helped us take one step closer towards our mission of providing equitable education to underserved communities.

The gala was a magical evening filled with heartwarming moments and unforgettable memories. We were honored to have Dr. Rachele Aidala as our keynote speaker, and her speech was an inspiring reminder of the transformative power of education. It was amazing to see so many like-minded individuals come together to support our cause and make a positive difference in the lives of those who need it most.

Thanks to your contributions and the support of our sponsors and partners, we were able to raise over \$100,000 to support our programs and initiatives. These funds will enable us to provide educational resources and coaching to underprivileged students and communities, empowering them to achieve their full potential.

I would like to take a moment to acknowledge and thank our sponsors and partners, **Shanna Birky Productions, Inc.** and **Haeyoung & Co.**, for their unwavering support and commitment to our mission.

We couldn't have done it without you! Your continued support and advocacy for the Coaching Collective are deeply appreciated. We invite you to stay connected with us by sharing our mission with your friends and colleagues during our Month of Giving campaign. Every contribution, big or small, can make a meaningful impact.

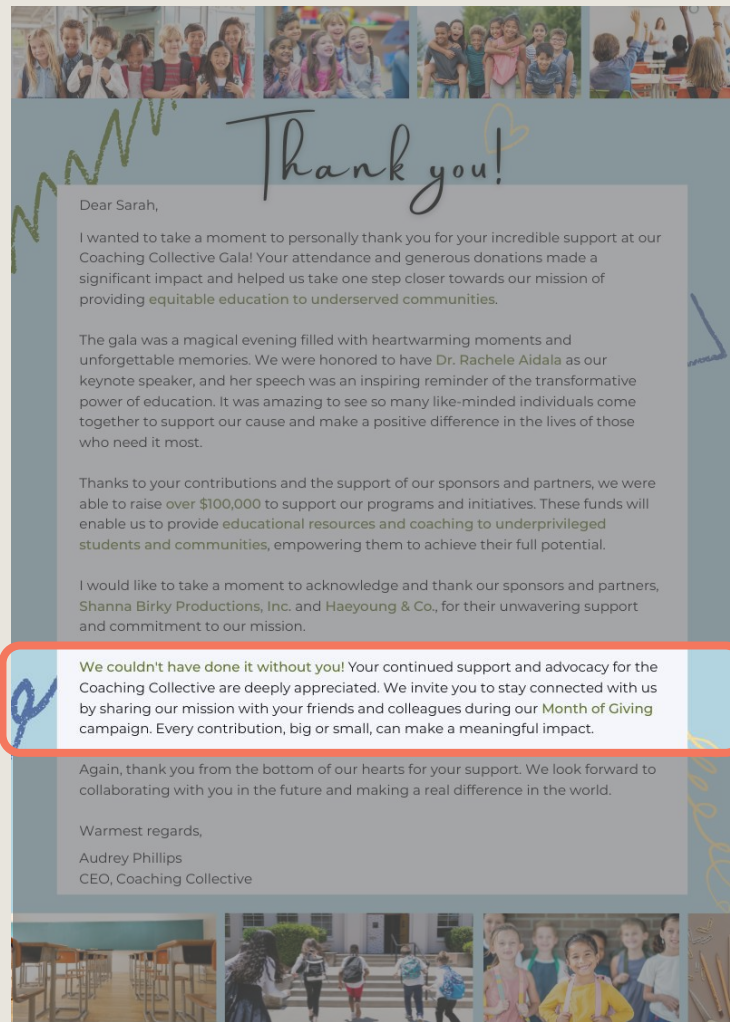
Again, thank you from the bottom of our hearts for your support. We look forward to collaborating with you in the future and making a real difference in the world.

Warmest regards,
Audrey Phillips
CEO, Coaching Collective

Basic Content

Mobilize and Empower the World for Good

- Thank You Message
- Event Recap
- Impact Statement
- Acknowledgement of Sponsors
- **Call-to-action + Next Steps**



Examples



The Big Little Ball



Thank you to everyone who made
The Big Little Ball a night to
remember!

Thank you to our Event Committee,
especially our co-chairs Joe and
Vaishali, we could not have done
this without your support!

COMMITTEE

Joe Petti, Co-Chair
Vaishali Mokashi, Co-Chair

Dominique Collins Gabriella Ferreira
Sophie Hoch Rose Mirzaie
Gabbi Oppenheimer AnnaMaria Smeraldi
Molly Vannucci

Thank you to Our Sponsors!

SPONSORS

goodapple

Constance Curran

CATHOLIC CHARITIES
HELP 100+
HOPE YEARS

VITA
COCO

TRINIDAD
CÓDIGO
1530

QUINN ROSE

Austin
EASTCIDERS

FIVE

Luck
Springs
A LUCKY LITTLE BALL

Our Silent Auction will remain open until
Sunday, December 6th, 11:59 pm.

You won't want to miss out on these
experiences and sports collectibles!

Bid Now

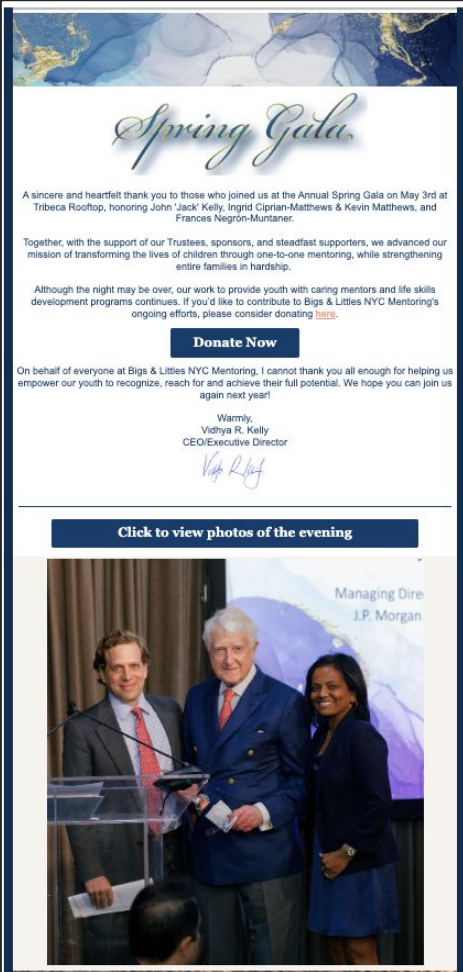
STAY TUNED and follow our social media
platforms for more photos which will be
posted once available!



Donate Now

Become a Mentor

More Examples



Spring Gala

A sincere and heartfelt thank you to those who joined us at the Annual Spring Gala on May 3rd at Tribeca Rooftop, honoring John 'Jack' Kelly, Ingrid Ciprian-Matthews & Kevin Matthews, and Frances Negron-Muntaner.

Together, with the support of our Trustees, sponsors, and steadfast supporters, we advanced our mission of transforming the lives of children through one-to-one mentoring, while strengthening entire families in hardship.

Although the night may be over, our work to provide youth with caring mentors and life skills development programs continues. If you'd like to contribute to Bigs & Littles NYC Mentoring's ongoing efforts, please consider donating [here](#).

Donate Now


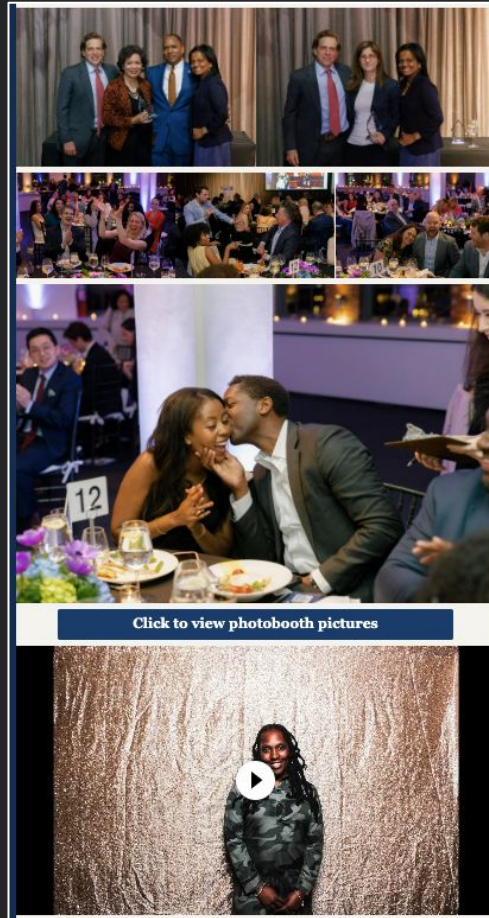
On behalf of everyone at Bigs & Littles NYC Mentoring, I cannot thank you all enough for helping us empower our youth to recognize, reach for and achieve their full potential. We hope you can join us again next year!

Warmly,
Vidhya R. Kelly
CEO/Executive Director

Vidhya R. Kelly

Click to view photos of the evening

Managing Dire
J.P. Morgan

Collage of photos from the Spring Gala event, including a group photo of staff, a large group of guests at a dinner table, a couple kissing at a table, and a woman in a camouflage jacket in a photobooth.

Click to view photobooth pictures

There is still time - Place your final bids before the silent auction closes on
Sunday, May 7th at 11:59pm

Place your final bids now on our Silent Auction!

A special thank you to our Benefit Chairs, Committee and Trustees & Benefactors

Benefit Chairs
Andrew Bogart • Nicole Lawrence

Benefit Committee
Amy Clupe • Sean Foley • Blanche Johnson
Joseph A. Pollicino, Jr. • Elian and Jonathan Tillman • Shari Verschell • Erin Wright

Trustees & Benefactors
Mahmmed Tarzid Alam (Zoe) • Susha and Shamus Bartlett • Lisa and Andrew Bogart • Amy and Timothy Clupe • Mary Claire Borever Lago and Christopher J. Lago • Cathy and John Dougherty • Sara and Pasquale Grunier • Blanche and Peter Johnson • Judith Donahue Lafranchi and Bruce Edward Lafranchi • Laurie and Pierre Lapierre • Nicole and Mark Lawrence • Montie Mills and Jerry Meshan • Patricia Moran • Catilla Pastor and Stephen Maharam • Linda DeCorato Perrotta and Joseph Perrotta • Trexia and Ewan Perissio • Maureen and Joseph A. Pollicino, Jr. • Marie Wallace Powers • Elizabeth and Bradley Robins • Darsi and Krishan Singh • Lotte and Donald Trip • Swick Jen and John Skougnessy • Anne and Carter Sullivan • Monsignor Nesto Sullivan • Elian and Jonathan Tillman • Shari and Henry Verschell • Erin and David Wright

Thank you to our Event & Auction Sponsors

Thank you!

Ingrid and John 'Jack' Kelly

Spring Gala

FIND US
137 East 2nd Street
New York, NY 10003
Tel: 212-475-3201

FOLLOW US

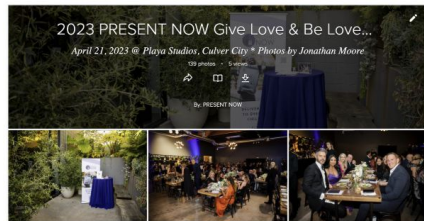
ABOUT US DONATE VOLUNTEER NOW

More Examples

Thank you for joining us for PRESENT NOW's 3rd Annual Give Love & Be Loved Gala on Friday, April 21, 2023 at Playa Studios. It was a memorable and impactful evening, where we celebrated & connected with YOU!

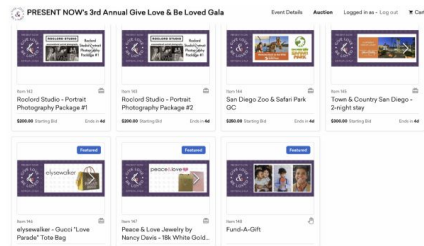
We are grateful to our sponsors, honorees, donors, guests, volunteers, and vendors for supporting our mission and helping to create such a wonderful night!

Please visit our [2023 GLBL Flickr album](#) to see some wonderful photos taken at the Gala. Feel free to download, share, and tag us on Instagram (@presentnowfoundation) and Facebook (@PRESENTNOW).



[View photos from the gala](#)

A handful of silent auction items remain for sale. [Visit our auction website to view and place your bids by 11:59 PM on Sunday, April 28, 2023.](#)



[Visit our Silent Auction site](#)

We thank you for your steadfast commitment to helping children who are living in shelters know that they are not forgotten as we celebrate their special moments and new beginnings.

[Visit our website](#) | [Become a Donor](#) | [Volunteer](#)



Thank you!

Donate



Together we raised nearly \$370,000!

Thank you to everyone that joined us last Thursday for our 20th Annual Hope for a Wild Future auction and dinner. We're excited to share our work with you and celebrate the impact we're having together on our wildlife and wildlands

If you weren't able to join us, enjoy this video that highlights our ongoing work to restore carnivores and ensure peaceful coexistence between humans, recreation, and wildlife.

Didn't make it? It's not too late to donate!

[DONATE](#)

Thank you for helping us keep the Northwest wild!



Hi Carly,

Thank you for attending *Drawing on Our Strength: A Conversation With Aly Raisman*. You showed you stand with survivors in a powerful way - raising **\$95,000** and counting.

Your participation and support helps keep our services available to survivors and their families. We could not do this work without you and hope you left feeling **hopeful and inspired**.

To watch the full recording of *Drawing on Our Strength: A Conversation with Aly Raisman* again, click the button below. Please note you will need to login to the Crazy Live page to watch the program and the event begins 14 minutes into the recording.

[CLICK TO WATCH](#)

There is still time to push us even further past our goal! If you would like to donate again, click the button below.

[DONATE](#)

Again, thank you so much for your participation. We're humbled by such a fantastic response, and are grateful for supporters like you.

Provide feedback for future events by [filling out this survey](#) by next Friday, October 7.

Thank you to our challenge pool donors!

Bill and Janette Adamucci
Grace Chen
Crista Cugini
Piper Henry
Altha Mark
Mentel O'Connor and Chuck Northoff
Amy and Patrick Schlicht
Karl Tupper

Thank you to our sponsors!

Partner Sponsors
Rushing
T-Mobile
Advocate Sponsors
Alaska Airlines
Delivery Express Logistics, Inc.
Deloitte LLP
HKM Employment Attorneys LLP
Vlad Popach Real Estate
Washington Gastroenterology
In-Kind Sponsors
EXP Events

FOLLOW @KCSARC



The Extra Mile

Unique Treatment for VIP Supporters



Proactive Outreach



Attendees

All That Jazz

Total Raised \$0.00

Attendees 28

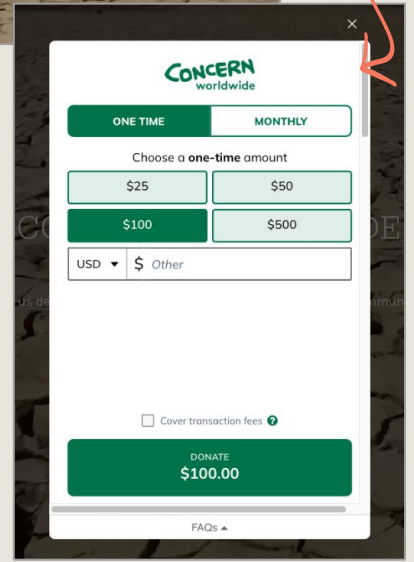
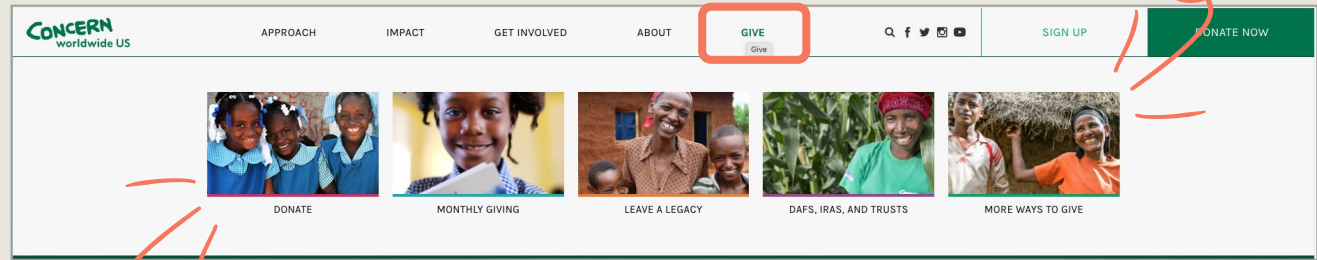
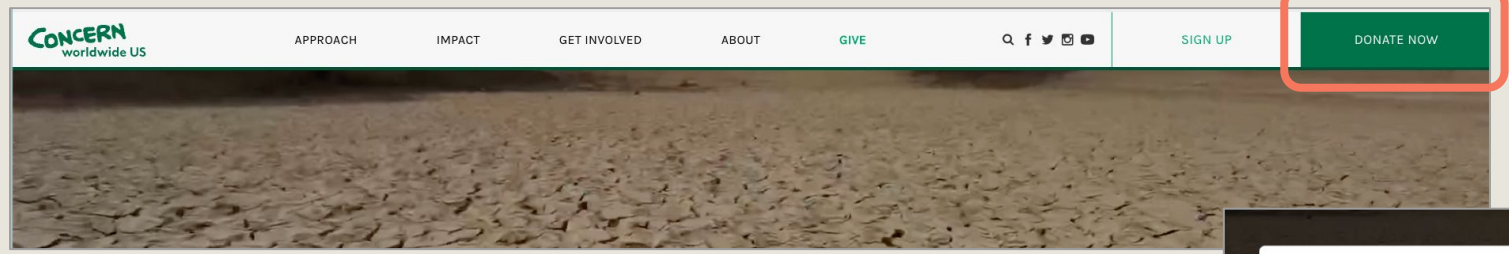


 Start collecting sponsors for your next event!

Attendee Last Name	Company	Ticket Name
John	Classy	Virtual Ticket
Catz	Classy	Virtual Ticket
Drammissi	Classy	Virtual Ticket

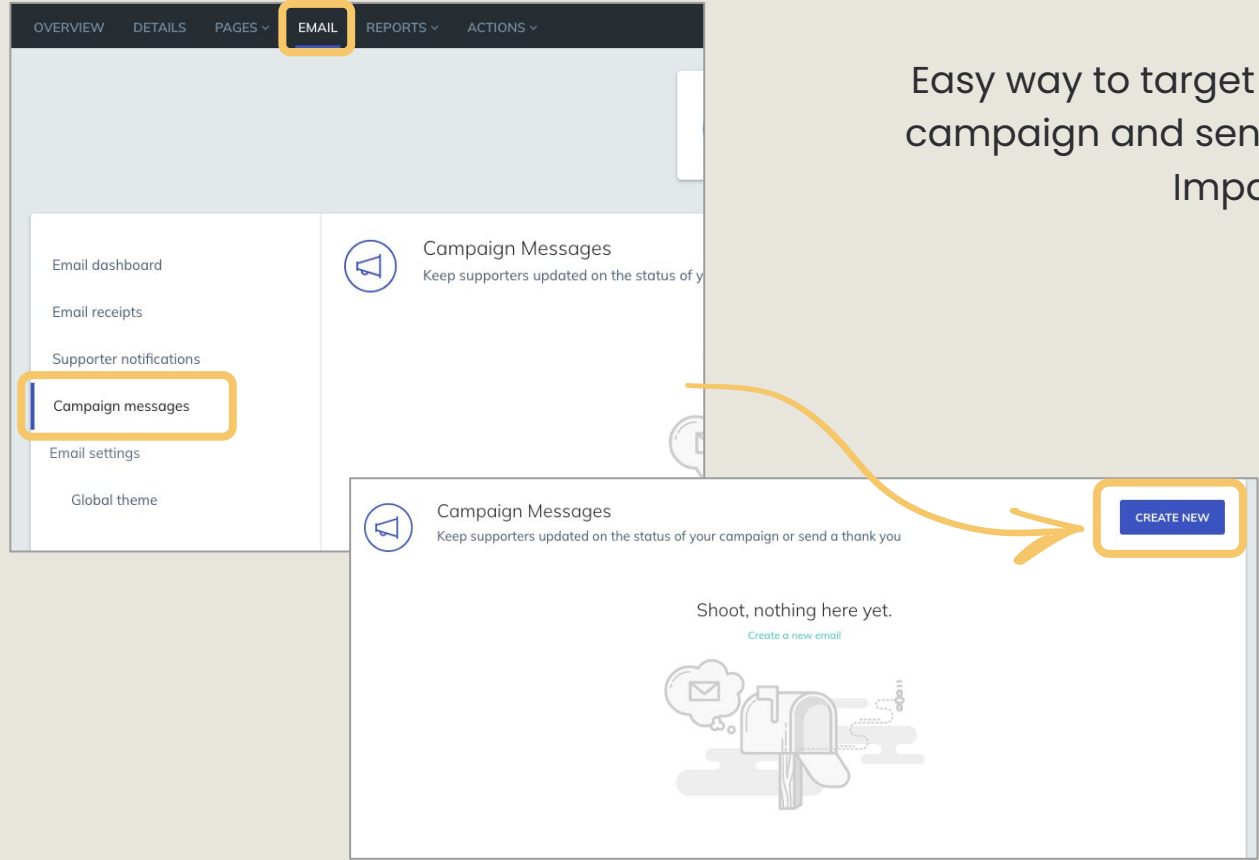
Website Optimization

Mobilize and Empower the World for Good



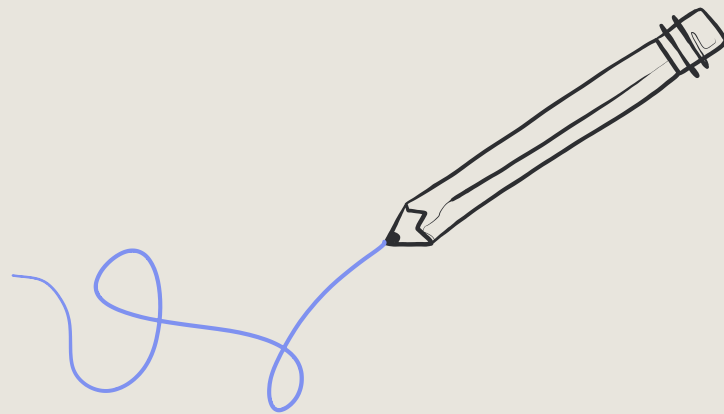
Campaign Messages

Easy way to target all donors from a specific campaign and send out Thank You emails or Impact Updates



Next Steps

1. Run through your post-event wrap up
2. Segment your supporters depending on the scale of your event
3. Draft out your thank you emails keeping the 'basic content' in mind while personalizing the message according to your segment audience
4. Add in any additional touches to go the extra mile
5. **Add in your attendees to your overall stewardship strategy** to ensure you're not missing out on your new loyal donors



Collaborative

Join us in Philly with fellow nonprofit professionals & social sector experts.

Together with the brightest minds & best fundraisers in the industry, we uncover the ideas that will propel our sector forward & unlock the world's generosity.

Dates

June 7-8, 2023

Location

Philadelphia, Pennsylvania
at The Fillmore



Classy