

AEP 2009 at UC San Diego

Notes from the Roundtable Discussion Luncheon

Topics:

Alumni Relations	Marketing & Branding
Campaigns	Protocol
Décor, Design, Creative	Vendor Relationships
Donor Relations	Volunteers & Boards
Event Software/Online Registration	

Questions asked:

What are the best practices and standard operating procedures?

What are some challenges and solutions?

Given the current economic crisis, are there any unique challenges and solutions?

Best Practices & Standard Operating Procedures

Alumni Relations

- To reach young alumni- use email, facebook, less hard copy mail
- Both online registration and traditional snail mail should be used to capture all audiences to an event
- Alumni relations are “friendraisers” not fundraisers.
- Charge minimal to no cost for events

Campaigns

- Don't get scared!
- Have total buy in from all the schools and units to make sure they understand the goals, etc and are completely on board.
- Consistency with the theme is important so that everything looks professional.
- Campaign events, in most cases, should not be paid events. .
- Don't do compulsory events- do compelling events!
- Elements of the Campaign Quiet phase:
 - Fundraising goals established
 - Theme and campaign brand development
 - Raise a large percentage of money, often half of campaign total goal
 - Time to re-educate and re-energize staff and donors
 - Develop and/or steward existing donor societies
 - Develop leadership councils of volunteers- used introduce the university to new prospects
 - Know/learn your audience- define them by interest/giving level

Décor, Design, Creative

- Set standard from perspective of clients and/or higher ups i.e. president, chancellor, etc.
- Who is my audience and what will be the reaction, what is being projected?
- Keep it simple, yet elegant. Pretentiousness is unacceptable
- Be sustainable, what can be re-used or recycled – communicate effort to audience
- Cultivate vendor relationships for future partnerships and sponsorship. Settle invoices quickly.
- Meet with peers or team members to set standards, share ideas, guidelines and/or policies
- Work with caterers, food vendors to test out new food ideas and/or trends.
- Find ways to make food, decor and entertainment interchangeable - multiple uses

Donor Relations

- You can never say “thank you” too much. Thank everyone no matter how small the gift.
- Quick turn around on thank yous is important
- Establishing protocol and hierarchy for contacting donors (NOT best practice example was thank letters to donors coming from multiple people every time a gift comes in).
- Stewardship! Customer service! Keeping up communication. Providing reports and personalized information (for donors above a certain amount).
- Donor-centric is keyword: tailoring communications to provide info as to where their \$ is going and what it's being used for. Putting faculty in touch with donors. Different for each donor.

Event Software/Online Registration

- Evaluate needs of organization. Many software packages available can be customized.
- Make sure information is portable, if you have a mobile office.
- Research and test available software options before purchasing new products, i.e. demos, free use of software for limited time, etc.
- Contact other industry professionals to get reviews on products.
- Consider ease of use and need for technical support when making decisions for purchasing new software.
- Set protocol. Get management approval regarding use of outside resources.

Marketing & Branding

- 3 C's – Clear, Concise and Consistent
- Less is more - Keep it simple, make it easy for everyone involved to carry out
- Always keep your eye on the goal of the event and audience.
- Have a theme throughout every aspect of the event, from the invites to the color of table linens
- Educate every party involved regarding the marketing and branding message. Everyone (faculty, staff and students) needs to understand the meaning and importance behind the marketing message.
- University of San Diego put a large board in the middle of campus with printed materials from across campus to show how disconnected the branding was. This sent a message to everyone that there needed to be a unified brand and look for all campus materials.
- Create a collection of materials to loan out for all departments to use with the same university branding. That way all materials used for events will be uniform.
- Create a centralized reference system that has the current branding and messaging campaigns for the whole campus to use when creating their own materials.

Protocol

- Most indicated they don't have anything in writing per se. Guidelines are communicated to constituents, clients at meetings.
- UCSD and USC both have Events Councils that are vehicles to disseminate information formally about protocol throughout the campus.
- USC requires campus community to acquire a permit to hold an event on campus. This allows for oversight, control, info for all who would be effected (i.e. campus police, protocol office, President's Office, parking, etc.)
- Elected Officials/Foreign dignitaries/VIP visits – UCSD requires those interested in hosting a foreign dignitary to the office of Special Events & Protocol before proceeding.
- USC provides a manual that includes all standardized forms for events so that everyone "speaks the same language," in terms of needs/expectations.
- SEE CASE 3 book series by April Harris

Overall consensus was that Chancellor/Pres needs to identify an office (e.g. Special Events & Protocol at UCSD or Protocol and Events Office at USC) as THE authority on all things university protocol. Must come from the top down. And, that communications is key to establishing standards of protocol throughout the campus (e.g. Events Council, Calendar Meetings that involves reps from across the campus as vehicles.)

Vendor Relationships

- Do your research
- Become a valued customer, establish a relationship with the vendor
- Ask for Discounts & Bid It Out (3 vendors Catering and/or venue)
- Thorough Event Documentation – Pre & Post Event
- Not always good to get locked into same vendor – get new ideas by working with new companies.
- Only way to find right vendors – live and learn from experience.

Volunteers & Boards

- Provide training, resources, and orientations that cover the following:
 - Provide information of who, what, why, where, when & how in regards to the event
 - If it is a 1 time event – provide a “briefing” sheet that contains the items listed above.
 - Provide what the end result of their participation is and what it means to the University.
 - Clearly identify who their supervisor is and how to contact.
 - Provide some sort of “thank-you” for their volunteer service (free t-shirt, food etc.)
- To Recruit volunteers:
 - Use internal staff, even VCs and Deans
 - Events Councils and student groups
 - “voluntold” – certain events – individuals told they will volunteer
 - Some volunteers always work the same events
 - Like to involve students for visibility purposes
 - VCs/deans serve as volunteers

Challenges & Solutions

Alumni Relations

Challenge: Getting data from Alumni

Solution: When they register for an event, have your alumni fill out their updated contact information, make it required.

Challenge: How to get younger alumni invite- “new blood” – when may not be working or involved heavily in paying debts.

Solution: Invite them to networking or sports events, volunteering- rather than donations

Campaigns

Challenge: Getting a cohesive message across the whole campus so that it’s not just individual departments raising money for themselves and the same people getting asked to give multiple times.

Solution:

Prospect management: groups working together to figure out what gift is in donor’s best interest.

Challenge: Putting out quality events without breaking the event budget

Solution:

Make existing local events your special events. Take advantage of the football games and inaugurations, etc. Try to find speakers or topics that are relevant so that the content matters more than the design.

Challenge: How to connect emotionally with donors, particularly with a science or research area

Solution:

Use compelling stories with people to make the science or research more human

Décor, Design, Creative

Challenge: Being creative

Solutions:

- Use trade magazines, the web, TV, home decorating magazines to come up with new ideas.
- Use food and entertainment as part of the decor and design.
- Attend trade shows.

Challenge: How will audience and/or client react? What statement is the event trying to project?

Solutions:

- Simple but elegant always works. Examples were serving a variety of foods but at smaller portions.
- Make creative choices with food, entertainment and decor
- Use local resources, i.e. local musician(s)/groups, artists or children’s groups as part of the decor

Donor Relations

Challenge: What do you get for the donor who has everything (how to say thank you)?

Solution: Think outside of the box. Personalized, thoughtful gifts are the way to go. Best practice is donor-centric, donor-specific. Examples were framed keepsakes, lab coats with branding as event giveaways (for medical schools), photo books made on shutterfly.com or by hand, and honorary degrees. More emotional, less standard. Personalized gifts can be less expensive too.

Challenge: Quality vs. Quantity

Solutions:

- Have event that are in intimate settings, this provides a unique experience for “top” donors.
- Try not to give all donors personal access to Chancellor or President. For the smaller donors utilize “Deans and Provost” in cultivation process.
- Have events at homes or clubs to create relationships with other wealthy members.

Challenge: What brings the donors out?

Solutions:

- Repeat events that are successful and bring together old friends (alumni) and donors who enjoy the event (often these events don't require change because it is the tradition, and is important to be an attendee.

Event Software/Online Registration

Challenge: Not all organizations have in-house tech person

Solution: Purchase software with on-line tech support; internet services

Challenge: Need for portable software

Solution: On-line web based software (i.e. Gmail, Google, Outlook, Web calendar)

Marketing & Branding

Challenge: Resistance from clients to include campus wide marketing and branding into aspects of their department's event.

Solution: Sell it to your client. Make them understand the importance of a unified marketing and branding campaign, and how helping the university as a whole, will help their department.

Challenge: Difference of creative opinion between you and your graphic designer.

Solutions:

- Take it into your own hands. Learn how to use different software programs to create your own materials. This can also cut costs.
- Go some place else, some times you may need to seek an off-campus graphic designer who understands your vision. You may even find that they will design your materials for a lower cost.

Protocol

Challenge: Registration at events – Maintaining high quality/protocol of those checking in VIP guests

Solutions:

- USC hires students from the departments utilizing event services who are professionally trained to person tables (i.e. appropriate dress, demeanor, etc.) The departments are recharged the cost of hiring the students.
- UCSD and other universities utilize student ambassadors from the Alumni Office who are trained in meeting and addressing VIPs.
- UCSD utilizes members of its Events Council as volunteers to person tables at events with one SE&P event staff on site to “supervise.”

Vendor Relationships

Challenge: The vendor messes up

Solutions:

- Meet up with vendor to say “this is not what we agreed upon.”
- Then send email explaining you’re on hiatus from using this company.

Challenge: Have trouble giving criticism to vendors.

Solution: Not giving feedback/suggestions is a disservice to your vendor.

Vendors get into a pattern and need to be shaken up. Tell them the good, the bad, and the ugly, especially the good.

Challenge: Hard to ensure all logistics will go off smoothly

Solutions:

- Get everything in writing.
- Follow-up phone conversation with email to cover your ass and ensure the info is understood.
- Follow up the day before.

Volunteers & Boards

Challenge: Not getting enough volunteers

Solutions:

- Pull from varied groups – don’t always use the same groups again and again – they get tired
- Think outside the box – use volunteer groups you may not have looked at before

Challenge: Challenging to work with

Solution: Charisma and diplomacy

Challenge: Organization is moving slower than Boards’ desire

Solution: Clearly identify the process & timeline

Challenge: Policy issues

Solution: Knowing what is the U’s policy on Volunteerism

Economic Challenges & Solutions

Alumni Relations

Challenge: Capturing out of state alumni

Solutions: With the current economic crisis most are finding that you can get almost anything for nothing now. Companies and corporations that once had restrictions and guidelines that university alumni could not penetrate are now being welcomed with open arms because they help provide business. Such places as Disneyland and ball games are giving huge discounts to alumni groups.

Campaigns

Challenge: Not enough money to spend on campaign events in general

Solutions:

- Work with vendors to provide items at reduced cost.
- Have fewer, more selective events to stretch your resources.

Challenge: Difficult to find donors willing and able to donate as liberally as other times

Solution: Stewardship, including events, becomes even more critical at these times so donors feel most respected and honored for their contributions.

Décor, Design, Creative

Challenge: Limited Resources

Solutions:

- Get to vendor base, take advantage of what they can offer
- Marketing what you can offer. What do you have that the vendor can use. Partnership.
- Use institutional resources for materials, volunteers, venues & money saving ideas
- Seek sponsors but check how you can legally promote them, if allowed.

Donor Relations

Challenge: Less donor \$ to go around/less internal \$ to play with

Solutions:

- Personalized, donor-centric stewardship is the answer to most aspects of this challenge.
- Lifetime donors, people who believe in the programs will not stop giving, although they may give less.
- Corporate giving is what will suffer, but must work harder with less \$ to keep these givers on radar.
- More frequent and personal, smaller events such as small donor dinners with the chancellor or alumni director once a month at someone's home as opposed to extravagant large scale events.
- Producing those less expensive, but more thoughtful thank yous.
- Moving things online/website.
- Eliminating Chotchkie's - Looking for more creative ways to brand.

Event Software/Online Registration

Challenge: Budgets

Solutions: Rent software; compare pricing; internet services more cost effective

Marketing & Branding

Challenge: Marketing & Branding on a tight budget

Solutions:

- Get sponsors – find business partners who have vested interest in education
- Create branded materials that can be used more than once and for a variety of events.

Protocol

Challenge: Going Green – We are consistently being asked to go “green” for events.

Solutions:

- Nametags – Many universities provide a collection basket so that guests can drop nametag/holders.
- Programs – have a few programs displayed at strategic points rather than one for per guest.
- Giveaways - Provide memory sticks with pertinent college information already downloaded so that guests makes gift useful. Also continues the “message” long after the event.
- On-line invitations and responses. Continue hard-copy invites and RSVP cards for senior donors.

Vendor Relationships

Challenge: Cutbacks

Solutions:

- Remember our vendors are as affected by the crisis as we are.
- With loyalty comes some freebies, but don't take advantage.
- Cut back and scale down where you can.
- Have different scenarios planned out in the event that you do have to cut back.

Volunteers & Boards

Challenge: Incentives for volunteers

Solutions: Cut back on food and gifts.

Challenge: May not need as many volunteers – events smaller

Solutions: More involved volunteers working events and volunteers more experienced