ASSOCIATION OF DONOR RELATIONS PROFESSIONALS

BUILDING RELATIONSHIPS FOR GOOD ®

ADRP Regional Event Toolkit

The ADRP Office is your partner throughout your entire regional event experience. The whole team is available to support you in hosting a successful event. Reach out to them directly with any questions at office@adrp.net. See more at adrp.net/contact-adrp. To ensure regular and seamless communication, a representative of the ADRP Office will attend the kick-off committee call and may also attend full committee calls/meetings and subcommittee meetings where necessary. The ADRP Board has entrusted the ADRP Office with the final say on regional event activities, including, but not limited to: budget, registration pricing, date, venue, and timeline.

The ADRP Board has delegated the management of the day-to-day operations of ADRP, including regional events, to the ADRP Office team. Depending on the size/format of your event, an ADRP Board Liaison may be appointed to join committee meetings and attend your event. The liaison is not a working member of your committee, but rather serves as a connector between you and the Board. The liaison reports event progress at monthly Board meetings and will be available to welcome your audience on behalf of the Board at your regional event. The liaison represents the Board and should not be asked to communicate with the ADRP Office about your event.

Each year, ADRP volunteers host regional events as a way to bring donor relations and stewardship professionals together to network, inspire, and learn about best practices within the profession.

Regional events are held in various locations across the United States and Canada, serving ADRP members and non-members as a platform to connect with professionals in their local areas. These events can only come to fruition through the hard work of our volunteers. With support, guidance, funding support, and approval from ADRP, volunteers create successful regional events and programs in a variety of formats.

Regional Event Benefits
- Opportunities for people to get together locally in either informal and formal settings
- Recruitment for ADRP
- Member benefits like monthly benefits as a complimentary fee
- Introduction to stewardship
- Provides year-round networking and volunteering opportunities

Typical Examples of Regional Events

- Coffee or Happy Hour: 10–25 guests who meet for networking and discussion
- Roundtable Discussion: 25–50 guests at your institution for a breakfast or lunch roundtable or panel discussion
- Regional Conference: 1-2 day event, 50–200 attendees, panel and/or multiple speakers
  *Detailed job descriptions for a Regional Conference can be found in the **ADRP Regional Conference Job Descriptions**

Investment of Time for Different Regional Events

| Coffee or Happy | Roundtable Discussion | Regional Conference |
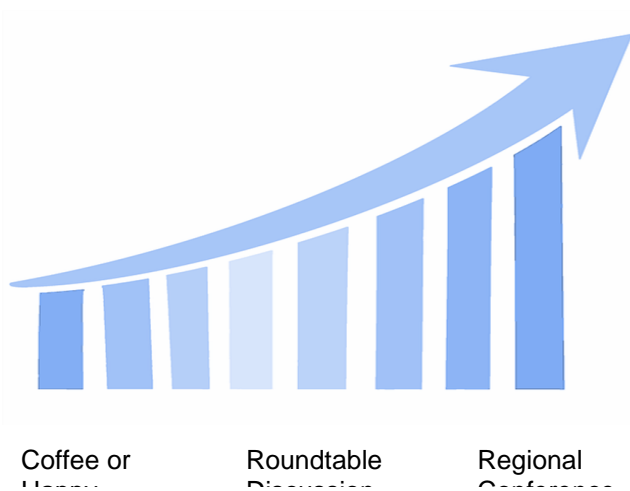
When & How Do I Get Started Hosting a Regional Event?

The preferred timeline for deciding to host a regional event is immediately after the conclusion of ADRP's International Conference each fall.

At that time, the ADRP Office will offer a standard **Fall Regional Event Orientation** for all regional event Chairs/Co-Chairs who have already self-identified. In that orientation, you will review the contents of this Toolkit, along with the **ADRP Regional Conference Job Descriptions**, **ADRP Sample Regional Conference Planning Timeline**, and **ADRP Sample Regional Conference Budget**.

STEP 1: Consider these *Important Questions* First
- What are the goals/objectives of the event?
- What are the needs of the audience/attendees?
- Which event format can best address those goals and needs?
- How will you make the event memorable for those who attend?

- Can the content created/shared at the event be recorded and used after the event with other ADRP members? Can ADRP charge for access to this content?
- Is this event a good opportunity for sponsor engagement and involvement?
- What costs will be involved with the event?

STEP 2: **Submit a Regional Event Inquiry Form:** Regional Event Inquiry
- Please submit this form as soon as possible
- If you are planning a 1-2 day conference, submit this form **at least six(6) months in advance**, or we may not be able to accommodate you
- For smaller events, such as coffee or happy hour, or a roundtable discussion, submit this form **at least four(4) months in advance**, or we may not be able to accommodate you

STEP 3: **The ADRP Office will Set Up an Event-Specific Orientation Meeting with Chair/Co-Chairs**
- As delegated by the ADRP Board, the ADRP Office will:
    - Serve as your primary point of contact for your regional event
    - Review the event format, logistics, timeline, and budget considerations with the Chair/Co-Chairs
    - If applicable, suggest a different format for your event, depending on their expertise, the location, expectation of turn-out, prior events, timing, etc.
    - Collaborate with Chair/Co-Chairs to review and, if necessary, modify your event's specific planning timeline so the ADRP Office can best support you alongside other ADRP activities
    - Collaborate with Chair/Co-Chairs to review and, if necessary, modify your event's specific budget in order to net positive revenue or, at a minimum, meet a "break-even" goal, as recommended by the ADRP Board

STEP 4: **Develop Your Event Committee and Start Planning!**
- Reach out to fellow ADRP members and begin forming your regional committee early so each member is involved in planning from start to finish
- The bigger your event, the bigger your committee should be!
- Align your committee with the **ADRP Regional Conference Job Descriptions**

The ADRP Board's primary objective for regional events is to foster connection, education, and engagement amongst fellow donor relations professionals. Nonetheless, the ADRP Board encourages you to strive for a net positive revenue, and at a minimum, a "break-even" goal.

What are the Roles of Volunteer(s) and the ADRP Office?

This list offers a broad overview and refers primarily to tasks involved in planning a 1-2 day regional conference. Please refer to the ADRP Regional Conference Job Descriptions, and your specific event's planning timeline and budget for more details.

Task	Volunteer(s)	ADRP Office
Date Selection	Volunteer hosts will propose a date that does not interfere with previously scheduled ADRP offerings. ADRP can accommodate two regional events per month, with no more than one event per week. Regionals may not occur within six weeks of the ADRP International Conference on either side. **Smaller networking events such as a coffee meetup or happy hour may be scheduled at the volunteer host's convenience for the purpose of networking regardless of the date's proximity to the Annual Conference.*	The ADRP Office will need to approve the proposed date suggested by the volunteer(s) and then will post on the ADRP website. This may also be dependent on venue selection and budget approval.
Event Timeline	Volunteers will develop a draft conference "To Do" timeline, identifying all tasks and deadlines, including communications. See **ADRP Sample Regional Conference Planning Timeline**.	The ADRP Office will review and approve your timeline, and may need to modify some deadlines in order to support your event while also supporting other ADRP activities.
Venue Selection	We recommend using the institution of the volunteer host or other institutional space deemed appropriate and determined to fit within the constraints of the event budget. Free space is ideal. It is recommended that the chosen city/venue be in a centralized location and near public transportation and/or the airport. ● Venue ideas should be	The ADRP Office will need to approve the venue and sign the contract for the venue.

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	discussed with the ADRP Office before a contract is requested. ● If a venue requires a deposit, provide the contract and pertinent information to the ADRP Office, allowing at least two weeks for the deposit to be paid. ● If a venue requires event liability insurance, provide the pertinent information to the ADRP Office, allowing at least one month for the insurance contract to be purchased. *Smaller networking events may be hosted at a local restaurant or gathering space as long as the space does not detract from the ADRP brand.*	
Budget	The volunteer hosts should create a budget for their event using the **ADRP Sample Regional Conference Budget** as a template. It is very important to consider all costs (food, venue/rental, linens, audio/visual needs, printing, postage, speaker fees and travel, and food service fees and taxes, etc.) when creating your budget. Service fees and taxes can appear on quotes as ++. ADRP will financially support all reasonable costs for breakfast, lunch, and/or reception fare. Registration costs should also be factored in. **In developing your budget, in particular registration prices, the ADRP Board encourages you to strive for a net positive revenue, and at a minimum, a**	The ADRP Office will provide advice on budget development. They will offer recommendations based on prior years, other regionals, and market performance for your area. Once all of the known expenses are identified and the number of expected attendees (or maximum number the venue can fit) are factored in, the ADRP Office will determine the member/non-member/committee member registration rates. When the final budget is approved by the ADRP Office and registration opened, invoices, deposits, and other expenses will be paid by the ADRP Office, so volunteers can avoid out-of-pocket expenses.

Task	Volunteer(s)	ADRP Office
	"break-even" goal.	**The ADRP Board has entrusted the ADRP Office with the final say on budget approval.**
Contracts	Volunteers may not enter into a contract on behalf of ADRP, nor should they personally enter into a contract for an ADRP-sponsored event.	All contracts must be approved and signed by the ADRP Office. Please allow at least one week for review.
Committee Meetings, Files, and ADRP Office Communication	Volunteers will set meetings and agendas for all committee calls. Volunteers shall invite an ADRP Office representative and the Board liaison to attend all core committee meetings, and any subcommittee meetings as necessary. ● Volunteers are welcome to use their personal or organizational communication systems, so long as all communication amongst committee members occurs via email, Basecamp, Zoom, or phone. Other communication programs can be utilized so long as all committee members, the ADRP Office representative, and Board liaison can access them. Volunteers are asked to utilize ADRP's preferred platforms for sharing of files: Basecamp and Google Drive. If, at any time, a Volunteer has a concern about an ADRP Office staff member, please contact the ADRP Executive Director directly.	A representative from the ADRP Office will attend all core committee meetings, and any subcommittee meetings as necessary. If needed, the ADRP Office can make their Zoom account available for committee meetings. The ADRP Office will provide access to a folder in Basecamp to share files for your regional event. You also have access to ADRP's Google Drive: Committees Google Drive to share dynamic files. Tip: when you want to share a file in Google Drive, select "Anyone with the link - Editor." This will allow users to access and edit without having a gmail account or a pin number to access. **Note: the ADRP Office cannot receive ACTION ITEMS sent via Basecamp or Google Drive. Please utilize the office@adrp.net address for any action items or requests.**

Task	Volunteer(s)	ADRP Office
Catering	All food selections must provide options for special dietary needs (e.g. vegetarian, vegan, gluten-free, etc.) as needed. Some venues will require use of their in-house caterer. Make sure to ask the venue about catering rules, and share with the ADRP Office any cut-off dates for guarantees.	Volunteers may work directly with the selected caterer, or the office can place the orders, depending on what works best for the situation.
Marketing	Volunteers are responsible for creating all marketing copy for e-blasts as well as content for the website. Content must be delivered via email to the ADRP Office at least 48 hours before the date of posting. Each event includes: ● Save the Date e-blast (all ADRP) ● Launch RFP e-blast ● RFP Reminder e-blast (2) ● Launch Registration e-blast (all ADRP) ● Reminder e-blast (targeted to your region) ● "Last chance to register" e-blast (targeted to your region) ● Attendee Know Before You Go e-blast ● Sponsor Know Before You Go e-blast ● Content delivered through regular ADRP Event Update e-blasts *Social media posts are managed by ADRP's MarCom Committee (volunteer-led). Volunteers should coordinate with the committee to	The ADRP Office will create a webpage and/or calendar page for your event. The ADRP Office will design and send out all materials.

Task	Volunteer(s)	ADRP Office
	promote the regional event on social media.	
Sponsors	Volunteers are asked to coordinate with ADRP's main Sponsorship Committee to avoid duplication. For example, ADRP Platinum Sponsors may have regional events included in their sponsorship package. Sponsors and exhibitors are an excellent addition to any event to help vendors connect with attendees and generate revenue for regional events. We do not recommend offering sponsorships for events with fewer than 50 attendees. It helps if volunteers do personal outreach to potential sponsors. Exhibitors should only be recruited if there is space in the venue to accommodate a comfortable area for them that will maximize attendee foot traffic to their tables.	If you decide to solicit sponsors, the ADRP Office will assist by creating a regional sponsor prospectus. The office will also create an online sponsorship form, collect payments/sign ups, and provide a sponsor tracking sheet to volunteers. Offers of in-kind sponsorships should be sent to the ADRP Office for consideration and acceptance.
Speakers/Content	Volunteer hosts are responsible for identifying all event content, including keynote and breakout speakers, and/or panel session hosts. As a volunteer host, you mayneed to personally solicit speakers and not rely solely upon response to a Request for Proposals. Please be sure to factor in speaker discounts according to **ADRP's Volunteer/Speaker Discount and Reimbursement Policy**. Establish learning objectives. For example, if you have sufficient content, you can implement "tracks" such as: Skill Building, Leadership & Management, and	Proposals for speakers must be submitted to the ADRP Office. The ADRP Office can help solicit proposals from other individuals who may be interested in speaking at this event by sending out a call for proposals. The office will then send the responses to volunteers for review, vetting, and selection. Hosts will be provided with ADRP-branded presentation slide templates for use by all presenters.

Task	Volunteer(s)	ADRP Office
	Social Responsibility.	
Program	Volunteers compile all content in final form for the regional program and deliver to the ADRP Office at least three weeks out. The ADRP Office will work with the Communications Lead to determine printing and delivery to the venue. **ADRP encourages you to Go Green with your regional event and consider utilizing digital or hybrid program options!**	The ADRP Office will design the program with one round of edits. If you require printing, the ADRP Office will arrange for printing and pickup at a local FedEx etc.
CFRE Credit	Volunteers must provide a final program to the ADRP Office. *"For general ATTENDANCE at workshops, seminars, conferences, and in-service training, [CFRE] points are awarded according to the actual amount of time spent under instruction at a ratio of 1:1. Forty-five (45) – sixty (60) minutes of instruction = one education point; 1 semester credit = fifteen (15) points. Points are not awarded for sessions that are less than 45 minutes in length but can be prorated for sessions exceeding sixty (60) minutes."*	When the committee submits the final approved program to the office, ADRP staff will submit the CFRE application for approval.
Registration	Volunteers will manage the registration table on the day of the event, confirming attendees listed and distributing badges. Volunteers should be prepared to take payment from walk-in attendees and from registrants who the ADRP Office have reported as owing their registration payment.	The ADRP Office will create a registration form online for your event, collect registrations, and provide registration reports to the volunteer(s). Note: ADRP is not able to collect payment in non-US dollars. For events held in Canada, only online credit card payments can be accepted, and only in US dollars. The exchange

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		rate will be factored into the registration rates. The office will provide [bi-weekly] registration updates with names and institutions to the committee.
Supplies	Most supplies will be provided to you by the ADRP Office. These supplies will need to be shipped back to the office after the event. Shipping costs will be reimbursed.	Name badges, ribbons, registration lists, handouts, and a Square device for walk-up registration will be shipped to the venue to arrive 2–3 days before the event. The ADRP Office will arrange for your event program to be printed for local pickup.
Evaluations	If you would like to ask specific survey questions, please email the ADRP Office with your content. If not, the office will use a standard survey template.	The ADRP Office will send out a post-event evaluation to attendees, speakers, and sponsors (if applicable). Results will be shared with regional volunteers.
Post-Event	Volunteer hosts are asked to hold a debrief meeting and produce a brief summary highlighting key take-aways and success stories following their regional event. This information will be shared with the greater ADRP community via social media and/or The Hub monthly newsletter. All documents and files created should be saved in final form for future use. Nominate potential Co-Chairs for the following year, including self-nomination if desired.	The ADRP Office will add materials from the event to a page on the website and send them to event attendees.

THANK YOU
for your interest in hosting an ADRP regional event!

ADRP is a volunteer-led organization - from our Board, to our webinar and conference speakers, to our various committees - we thrive because of individuals like YOU who have stepped up to lead the way. We are grateful you have offered to give your time, talent, and enthusiasm to ADRP. As such, we want to recognize you, and your fellow regional event volunteers, for your efforts. Please refer to the **ADRP Volunteer/Speaker Discount & Reimbursement Policy** as it relates to regional events, and reach out to office@adrp.net if you have any questions.