

## ADRP Regional Event Toolkit

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.

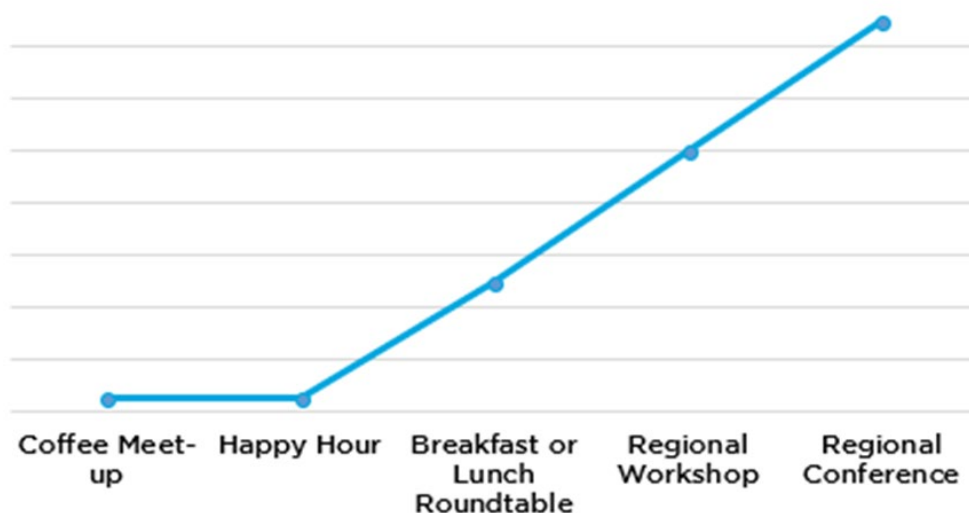
### Regional Event Benefits

- Opportunities for people to get together locally in either informal and formal settings
- Recruitment for ADRP
- Regional events allow our association to provide 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 Meet-up or Happy Hour**  
10–25 guests who meet for networking and discussion
- **Breakfast or Lunch Roundtable**  
25–50 guests at your institution for a breakfast or lunch roundtable discussion. Can include a panel discussion
- **Regional Workshop**  
50–100 attendees, with 3–4 speakers and a panel or information roundtable discussions
- **Regional Conference**  
One or two-day event in your town with multiple speakers. Intended to create lasting connections with your colleagues

### Investment of Time



## Steps to Hosting a Regional Event

1. Submit a Regional Event Inquiry form. (hyperlink “Regional Event Inquiry”)
2. The ADRP office will follow up with a phone call with the volunteer host to go over ideas, logistics, timeline, and budget considerations.
3. Define Chair/Committee Members
4. Prep and Planning with office support
5. Host Event

### How to Develop an Event Committee

- Establish individual committee members’ responsibilities and plan any sub-committee(s) you may need prior to approaching people to join the committee. Typical sub-committees include:
  - Content/Program
  - Attendee Experience
  - Sponsors/Exhibitors
  - Logistics—Venue, AV, Budget
  - Marketing
- Reach out to fellow ADRP members and begin forming your committee early so each member is involved in planning from start to finish. A strong regional events committee typically consists of five members.

### What is the role of the Volunteer(s) versus the ADRP Office?

#### Date Selection:

**Volunteer:** Volunteer hosts will select 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 meet-up 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.*

**Office:** The ADRP Office will need to approve the date suggested by the volunteer(s) and then will post on the ADRP website.

## Venue Selection:

**Volunteer:** 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 the best space. 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 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.*

**Office:** The ADRP Office will need to approve the venue and sign the contract for the venue.

## Marketing:

**Volunteer:** 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. The ADRP Office will design and send out all materials.

Each event includes:

- Launch 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
- Social media posts
- Content delivered through regular ADRP Event Update e-blasts

**Office:** The office will create a webpage and/or calendar page for your event. Regional events may have one stand-alone email announcement sent to the whole ADRP database, and up to five stand-alone emails to a relevant targeted audience leading up to the event.

## Post Event:

**Volunteer:** Volunteer hosts are asked to 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.

Materials from the event will be added to a page on the website and sent to event attendees.

## The following items are needed for roundtables and larger events:

### Budget:

**Volunteer:** The volunteer hosts should create a budget for their event. A sample budget can be found [here](#). It is very important to consider all costs (food, venue/rental, linens, audio/visual needs, printing, speaker fees and travel, and food service fees and taxes, etc.) when creating your budget. Service fees and taxes can appear on quotes as ++. (For example: if your price-per-person is \$20, your service fee is 22%, and state sales tax is 7%, your actual price-per-person is \$26.11 (\$20 + \$4.40 service fee = \$24.40 + \$1.71 sales tax = \$26.11) ADRP will financially support all reasonable costs for breakfast, lunch, and/or reception fare. Registration costs should also be factored in. Regional events are expected to earn positive net revenue in order to help support ADRP's free member benefits, such as our webinar series.

**Office:** The ADRP Office will provide advice on budget development. 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 office can help determine the member/non-member/committee member registration rates.

When the final budget is approved and registration opened, invoices, deposits, and other expenses, will be paid by the ADRP Office, so volunteers can avoid out-of-pocket expenses.

### Catering Considerations:

**Volunteer:** 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.

**Office:** Volunteers may work directly with the selected caterer, or the office can place the orders, depending on what works best for the situation.

### Speakers:

**Volunteer:** Volunteer hosts are responsible for identifying all event content, including keynote and breakout speakers, and/or panel session hosts. Speakers at ADRP Regionals receive free or discounted registration, depending on the size and cost of the event. As a volunteer host, you may know one or two of your speakers already. Please be sure to factor speaker discounted registration into budget totals, as well as speaker travel costs (e.g., parking, airfare, hotel).

**Office:** Proposals for speakers must be submitted to the ADRP Office budget approval. 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.

## Sponsors:

**Volunteer:** 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.

**Office:** If you decide to solicit sponsors, the ADRP Office will assist by creating a regional sponsor prospectus (hyperlink prospectus). The office will also create an online sponsorship form, collect payments/sign ups, and provide a sponsor tracking sheet to volunteers.

## CFRE:

“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 pro-rated for sessions exceeding sixty (60) minutes.”

**Volunteer:** The volunteer must provide a final program to the office.

**Office:** When the committee submits the final approved program to the office, ADRP staff will submit the CFRE application for approval.

## Registration:

**Office:** 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 rate will be factored in to the registration rates. The office will provide [bi-weekly] registration updates with names and institutions to the committee.

## Supplies:

**Office:** Name badges, ribbons, registration lists, handouts, and a Square device for walk-up registration will be shipped to you to arrive 2-3 days before the event. These supplies will need to be shipped back to the office after the event. Shipping costs will be reimbursed.

### Contracts:

**Volunteer:** Volunteers may not enter into a contract on behalf of ADRP, nor should they personally enter into a contract for an ADRP-sponsored event.

**Office:** All contracts must be approved and signed by the ADRP Office. Please allow at least one week for review.

### Evaluations:

**Office:** The ADRP Office will send out a post-event evaluation to attendees, speakers, and sponsors (if applicable). Results will be shared with regional volunteers. If you would like to ask specific questions, please email the office with your content. If not, the office will use a standard survey template.

[Submit an Inquiry](#)

*Thank you for your interest in hosting a regional event!*