

# GIFT ANNOUNCEMENT & CELEBRATION PLANNING PROCESS

JULY 1, 2022

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# HOW TO REQUEST A PROPOSAL

# Proposal Request Process

1. Visit the appropriate link below.

## [Print Requests](#)

2. Fill out all the fields. Select Proposal under Print Asset Type.

- Budget field can be 0 unless the project is unique and requires a budget conversation.

DAR Print Project Type\*

New  
 Update  
 Reprint with no changes

DAR Print Asset Type\* ?

All  
 Brochure/Flyer  
 Clemson World Ad  
 Direct Mail  
 Event Collateral  
 One-Pager  
 Orange The Experience Ad  
 Poster/Signage  
 Promotional Item  
 Proposal  
 Other

Has this been reviewed by the Principal Gift ... \*

Yes  
 No

What is the ask amount?\*

2.5

Date of Presentation\*

Sep 23, 2022

Consult this training link for more resources: [Workfront Training Resources](#)

# GIFT PROPOSAL PLANNING PROCESS

# KICKOFF MEETING - PROPOSAL

**Participants:** Development Officer, Director of Marketing, Writer

## **Agenda:**

- What method of delivery is best? (print, email, etc.)
- What format is best? (longform, PowerPoint, one-pager, etc.)
- How key is the proposal in the commitment?
- What should the tone be? (emotional, straightforward/technical, etc.)
- How should the numbers be laid out?
- What donor information should we include?
- If this is a facilities naming opportunity, do sketches need to be included?

## **Action Steps:**

- Write proposal
- Produce sketches if appropriate

# COPY DRAFT REVIEW MEETING – PROPOSAL (OPTIONAL)

**Participants:** Development Officer, Director of Marketing, Writer

**Agenda:**

- Is the story clearly carried throughout?
- Are the numbers reflected accurately?

**Action Steps:**

- Make edits and send updated draft back
- Send final copy to design upon approval

# DESIGN DRAFT REVIEW MEETING – PROPOSAL (OPTIONAL)

**Participants:** Development Officer, Director of Marketing, Writer, Designer

**Agenda:**

- Is the layout clear?
- Do the images convey the story?
- Is the format correct?

**Action Steps:**

- Make edits and send updated draft back
- Print if needed upon approval



# DONOR ENGAGEMENT AND EVENT REQUESTS

# DONOR ENGAGEMENT REQUEST OR AN EVENT TEAM REQUEST?

The purpose of the Presidential Request Tool is to be a central location for Advancement to request the President's attendance and/or speaking request at a proposed donor meeting or event. This is to ensure that the VP of Advancement is managing what events the President should be attending as well as being able to a record location of the events he is a part of. A report is submitted annually to the President on his involvement with donors.

REQUEST	WHICH FORM TO USE	WHO IS LEAD?
Proposal Presentations (\$2.5M+)	Event Team Request	Events Team
Advancement Gift Announcements (\$2.5 Million & Up)	Event Team Request	Events Team
Groundbreakings	Event Team Request	Events Team
Ribbon Cuttings	Event Team Request	Events Team
Planned Giving Society Events	Event Team Request	Events Team
Cumulative Giving Society Events	Event Team Request	Events Team
Donor involved Scholarship Events	Event Team Request	Events Team
Post Season Events	Event Team Request	Events Team
Alumni Club Events	Event Team Request	Alumni
Designated Annual Events	Event Team Request	Events Team
Dinner at the President and First Lady's home	Event Team Request	Events Team
Designated Annual Donor Visits	Event Team Request	Events Team
Committee on Philanthropy & Order of the Oak Meetings and events	Event Team Request	Events Team
Alumni or General Tailgate Requests for President	Event Team Request	Alumni/ College
Athletic Suite Requests for President	Event Team Request	Events Team
DO Request for Donor Visit with President and will not require Events Team	Donor Engagement Request	DO
1:1 meetings with President and donor	Donor Engagement Request	Requestor
Restaurant dinner with President and donor	Donor Engagement Request	Requestor
Development Office/Donor trips with President (no event associated with visit)	Donor Engagement Request	Requestor
Small event where the UDT/College/Unit will be planning the event	Donor Engagement Request	UDT/College/Unit
Request for President to speak at event planned and executed by UDT/College/Unit	Donor Engagement Request	UDT/College/Unit
Presidential attendance at Clemson sporting events	Donor Engagement Request	Requestor
Alumni Reunion or Clemson Club events	Donor Engagement Request	Alumni

# EVENT APPROVAL PROCESS

Please follow the event/date approval process below for all requested events. To streamline the process, we are asking all requests go through the Presidential Request Tool where you will be directed to the Events Team. Individuals should not directly reach out to the Advancement Development Coordinator or the President's office.

## 1 Director of Events

- Evaluate the event and review with VP of Advancement.
  - Determine if the Advancement Event Team is the appropriate group to plan this event and if President should be attending.
  - Approve or deny\* event.
- \*If denied, you will receive a notification.



## 2 President's Office

- Review dates.
- Approve President's attendance.
- If change is required, director of events will review.



## 3 President's Home (If Applicable for Requested Location)

- Review dates.
- Approve venue.
- If change is required, director of events will review.



## 4 Director of Events

- Provide Final Approval
- Assign Lead Planner to Start Planning

# HOW TO REQUEST AN EVENT

# HOW TO REQUEST AN EVENT

1

## PRESIDENTIAL REQUEST TOOL

### Decision Tree - Where to submit?

#### Donor Engagement Request

- DO Request for Donor Visit with President- will not require Advancement Events Team for planning or execution
- 1:1 meetings with President and donor
- Restaurant dinner with President and donor
- Development Office/Donor trips with President (no event associated with visit)
- Small event where the UDT/College/Unit will be planning all the logistics for the event (ex. college board meeting)
- Request for President to speak at event planned and executed by UDT/College/Unit
- Presidential attendance at Clemson sporting events
- Alumni Reunion or Clemson Club events

*President Clements Donor Engagement Request – Advancement Events Team is not needed to help plan or execute the donor visit or engagement*

#### Advancement Event Team Request

- Proposal Presentations (\$2.5M+)
- Advancement Gift Announcements (\$2.5 Million & Up)
- Groundbreakings
- Ribbon Cuttings
- Planned Giving Society Events
- Cumulative Giving Society Events
- Donor involved Scholarship Events
- Post Season Events
- Alumni Club Events
- Designated Annual Events
- Dinner at the President and First Lady's home
- Designated Annual Donor Visits
- Committee on Philanthropy (COP) and Order of the Oak (OOO) Meetings
- Alumni or General Tailgate Requests for President
- Athletic Suite Requests for President

*Special Events Team Request – Advancement Events Team is needed to help plan and execute the event*

#### Submitting your Donor Engagement Request:

To submit your **Donor Engagement Request** based on the above criteria, please visit this [Form](#).

#### Submitting your Advancement Event Team Request:

To submit your **Advancement Event Team Request** based on the above criteria, please visit this [Form](#).

1. Navigate to the [Presidential Request Tool](#)

# HOW TO REQUEST AN EVENT

## PRESIDENTIAL REQUEST TOOL

### 2 Decision Tree - Where to submit?

#### Donor Engagement Request

A

- DO Request for Donor Visit with President- will not require Advancement Events Team for planning or execution
- 1:1 meetings with President and donor
- Restaurant dinner with President and donor
- Development Office/Donor trips with President (no event associated with visit)
- Small event where the UDT/College/Unit will be planning all the logistics for the event (ex. college board meeting)
- Request for President to speak at event planned and executed by UDT/College/Unit
- Presidential attendance at Clemson sporting events
- Alumni Reunion or Clemson Club events

*President Clements Donor Engagement Request – Advancement Events Team is not needed to help plan or execute the donor visit or engagement*

#### Advancement Event Team Request

B

- Proposal Presentations (\$2.5M+)
- Advancement Gift Announcements (\$2.5 Million & Up)
- Groundbreakings
- Ribbon Cuttings
- Planned Giving Society Events
- Cumulative Giving Society Events
- Donor involved Scholarship Events
- Post Season Events
- Alumni Club Events
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- Dinner at the President and First Lady's home
- Designated Annual Donor Visits
- Committee on Philanthropy (COP) and Order of the Oak (OOO) Meetings
- Alumni or General Tailgate Requests for President
- Athletic Suite Requests for President

*Special Events Team Request – Advancement Events Team is needed to help plan and execute the event*

#### Submitting your Donor Engagement Request:

To submit your **Donor Engagement Request** based on the above criteria, please visit this [Form](#).

#### Submitting your Advancement Event Team Request:

3

To submit your **Advancement Event Team Request** based on the above criteria, please visit this [Form](#).

2. Using the Decision Tree, determine if you need to request a Donor Engagement Request (A) or an Advancement Event Team Request (B)

3. Once determined, select the appropriate form to request your visit or event.

# HOW TO REQUEST AN ADVANCEMENT EVENT TEAM REQUEST



## Advancement Event Team Request

Use this form to submit requests for Presidential Level Events where the Advancement Events Team is needed to help plan and execute the event. Additionally, please indicate whether you would like to request Beth Clements in the request.

1 Event Requested By \*

2 Requesting College or Department \*

3 Submitted By \*

4 Submitter's Email \*

Once in the Advancement Event Team Request Form, fill out the following information:

1. Event Requested By- List the name of the person who has asked for you to make this event request.
2. Requesting College or Department- List the College or Department that is the main sponsor of this event.
3. Submitted By- List your name
4. Submitter's Email- List your Email

# HOW TO REQUEST AN ADVANCEMENT EVENT TEAM REQUEST

## Event Request Information

**1 Event Title \***

**2 Event Type \***

**3 Description of the Event \***

**4 List Distinguished Guests to be Invited \***

**5 Estimated Attendance \***

**6 Run Of Show**

List preferences on the Run of Show/ Timeline of the event including speakers.

**7 Event Dress Code**

**1. Event Title**

- Include the **name** then **year** of the event.
- Use acronyms when referring to committees or groups.
- Ex: *BOT Leadership Reception 2021*

**2. Event Type-** List the event designation from the dropdown menu.

**3. Description-** Describe the event's purpose & goal. If it is a gift announcement, please list the gift amount and gift designations.

**4. Distinguished Guests-** List any VIP boards and other guests you want to ensure are invited event. Later in the planning process, we will pull each constituent from Cadence but at this time, this gives us a general picture of the audience.

**5. Estimated Attendance-** How many guests would you like at the event.

**6. Run of Show-** Preferences on the ROS/ Timeline including any proposed speakers.

**7. Dress Code-** Clemson Casual, Cocktail, Black Tie, etc.



# HOW TO REQUEST AN ADVANCEMENT EVENT TEAM REQUEST



## Advancement Event Team Request

Use this form to submit requests for Presidential Level Events where the Advancement Events Team is needed to help plan and execute the event. Additionally, please indicate whether you would like to request Beth Clements in the request.

**1** Event Requested By \*

**2** Requesting College or Department \*

**3** Submitted By \*

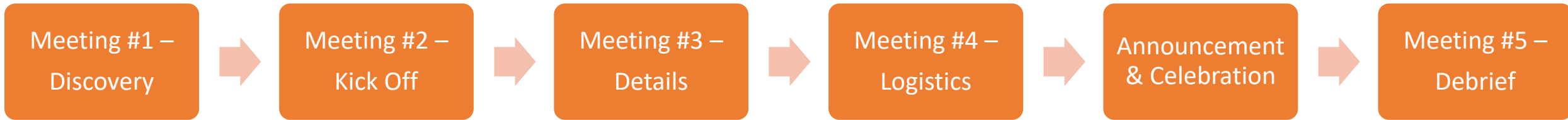
**4** Submitter's Email \*

Once in the Advancement Event Team Request Form, fill out the following information:

1. Event Requested By- List the name of the person who has asked for you to make this event request.
2. Requesting College or Department- List the College or Department that is the main sponsor of this event.
3. Submitted By- List your name
4. Submitter's Email- List your Email

# GIFT ANNOUNCEMENT & CELEBRATION PLANNING PROCESS

# GIFT ANNOUNCEMENT & CELEBRATION PLANNING PROCESS



# GIFT ANNOUNCEMENT & CELEBRATION PLANNING PROCESS DETAILS

## MEETING #1 – DISCOVERY

**In Meeting:** Development Officer, Senior Director of Marketing, Communications & Events, Director of Events, Director of Marketing, Events Admin. Coordinator, Senior Director of Central Donor Relations, Unit Lead (Optional)

**Runs Meeting:** Senior Director of Marketing, Communications & Events

**Discuss:**

- Donor/Gift Background
- Announcement
- Celebration Event
- Program/Video Participants
- Donor Recognition
- Follow Up
- Action Steps

## MEETING #2 – KICK OFF

**In Meeting:** Development Officer, Director of Events, Event Planner, Events Admin. Coordinator, Comm. Coordinator, Senior Director of CDR, Unit Lead (Optional), Presidential Communications (Optional)

**Runs Meeting:** Event Lead

**Discuss:**

- Events
  - Purpose of Event
  - Planning Timeline
  - Proposed Run of Show
  - Event Concepts
- Marketing
  - Announcement Story
  - Video
  - Donor Relations
  - Donor Recognition
- Development Officer brings requested guest lists.

## MEETING #3 – DETAILS

**In Meeting:** Development Officer, Director of Events, Event Planner, Events Admin. Coordinator, Comm. Coordinator, Senior Director of CDR, Unit Lead (Optional), Presidential Communications (Optional)

**Runs Meeting:** Event Lead

**Discuss:**

- Events
  - Event Presentation
  - Design
  - Run of Show
  - RSVP Update
- Marketing
  - Announcement Story
  - Video
  - Script Update
- Donor Relations
  - Donor Recognition
- Feedback & Next Steps

## MEETING #4 – LOGISTICS

**In Meeting:** Development Officer, Director of Events, Event Planner, Events Admin. Coordinator, Comm. Coordinator, Senior Director of CDR, Unit Lead (Optional), Presidential Communications (Optional)

**Runs Meeting:** Event Lead

**Discuss:**

- Events
  - Run of Show
  - Staffing Plan
  - RSVP Update
  - Logistics of Event
- Marketing
  - Announcement Story
  - Video
  - Script Update
- Donor Relations
  - Donor Recognition

## MEETING #5 – DEBRIEF

**In Meeting:** Development Officer, Senior Director of Marketing, Comm. & Events, Director of Events, Event Planner, Events Admin. Coordinator, Director of Marketing, Communications Coordinator, Senior Director of Central Donor Relations, Unit Lead (Optional), Presidential Communications (Optional)

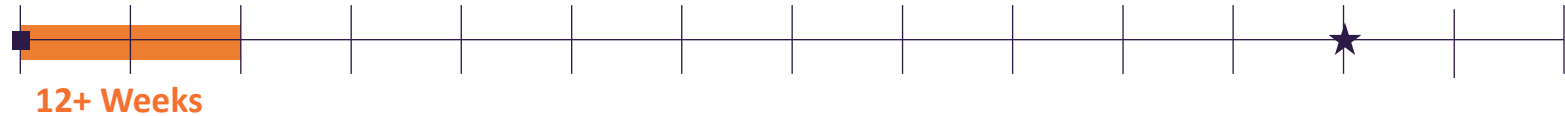
**Runs Meeting:** Event Lead

**Discuss:**

- What went well?
- What can we improve?
- Follow Up from Announcement & Celebration Event

# GIFT CELEBRATION PLANNING TIMELINE

# 12+ Week Tasks



## Development Officer

- [Request event.](#)
- Create faculty and staff guestlist.
- Request donor's family and friends list.

## Director of Events

- Manage approval process.
- Assign planner.
- Determine contract signers.
- Get invitation approved by appropriate parties.

## Planner

- Mark catering calendar.
- Book venue.
- Design invitation using templates.
- Print invitation.
- Finalize guestlist.

## Admin.

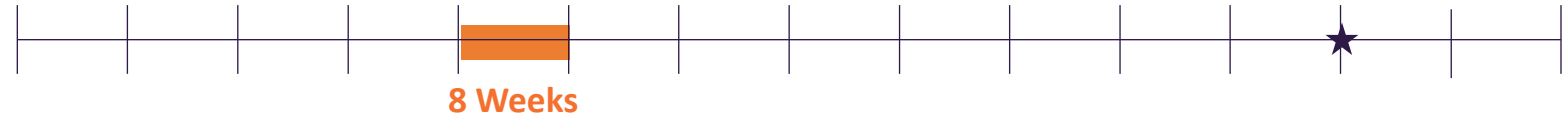
- Schedule kick off meeting.
- Upload meeting notes (final event documents).

## Meeting: Kick Off

- • **Invite:** Development Officer, Director of Events, Event Planner, Events Admin. Coordinator, Comm. Coordinator, Senior Director of CDR, Unit Lead (Optional), Presidential Communications (Optional)
- **Runs Meeting:** Event Lead
- **Discuss:**
  - Events
    - Purpose of Event
    - Planning Timeline
    - Proposed Run of Show
    - Event Concepts
  - Marketing
    - Announcement Story
    - Video
    - Donor Relations
    - Donor Recognition
- Development Officer brings requested guest lists.

★ = Event ■ = Meeting

# 8 Week Tasks



## Planner

- Send invitations
- Develop draft ROS (speakers, schedule).
- Contact catering.
- Develop details presentation.
  - Include sample menu (food and bar), design elements, layout, décor, draft ROS.
- Send draft ROS to script writers.
- Track budget in excel sheet.

## Admin.

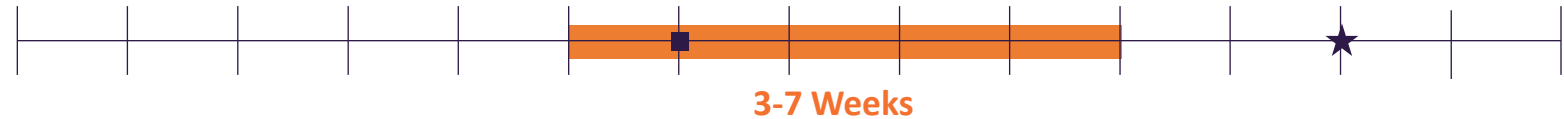
- Schedule details meeting.
- Book mascot.

## Marketing Coordinator

- Secure photographer.
- Secure videographer.

★ = Event   ■ = Meeting

## 3-7 Week Tasks



### Planner

- Book florist, upload contract to the event tool (resources and templates).
- Book Event Rentals quote (invoices and contracts).
- Book entertainment (invoices and contracts).
- Book A/V.
- Contact parking services/book transportation.
- Upload layout into event tool (final event documents)
- Upload design presentation into event tool (final event documents).
- Add event vendors to event vendors in event tool.
- Email/forward BB&T receipts to admin.

### Admin./Student Worker

- Upload guest list to event tool.
- Upload RSVP list weekly in event tool (final event documents).
- Upload meeting notes (final event documents).

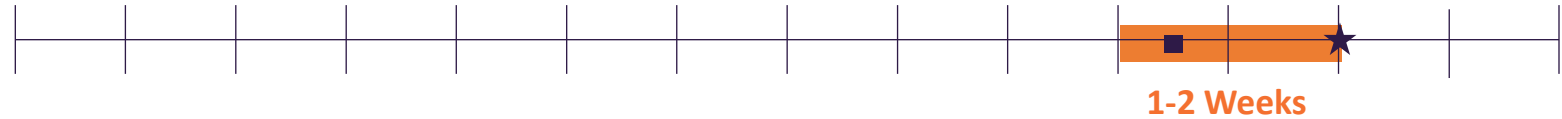
### ■ Meeting: Details

- **Invite:** Development Officer, Director of Events, Event Planner, Events Admin. Coordinator, Comm. Coordinator, Senior Director of CDR, Unit Lead (Optional), Presidential Communications (Optional)
- **Runs Meeting:** Event Lead
- **Discuss:**
  - Events
    - Event Presentation
    - Design
    - Run of Show
    - RSVP Update
  - Marketing
    - Announcement Story
    - Video
    - Script Update
    - Donor Relations
    - Donor Recognition
- Feedback & Next Steps

★ = Event ■ = Meeting



# 1-2 Week Tasks



## Planner

- Create event team timeline.
- Develop seating chart and reserved seating.
- Finalize script (upload to final event documents).
- Confirm time, layout and guest count with catering.
- Confirm time and layout with Event Rentals.
- Send staffing list.
- Create ROS binder.
  - Include ROS and script divided by speaker.
- Create event binder.
  - Include timeline, script, guest list (accepted and declined), layout, vendor contracts.
- Tag family, VIP and script recognition in Social Tables.
- Log all expenses into budget spreadsheet (upload to final event documents).

## Students/Admin.

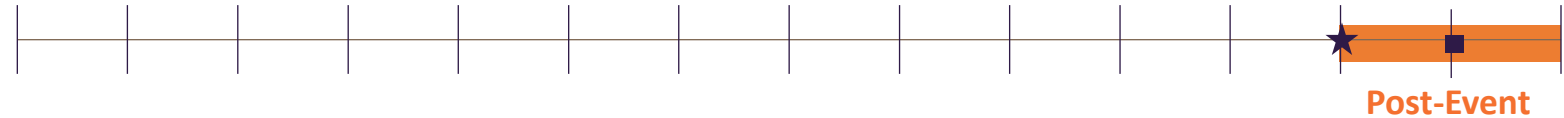
- Follow up on RSVPs.
- Schedule (optional) logistics meeting.
- Upload meeting notes.
- Upload RSVP list weekly in event tool.
- Print and stuff name tags.
- Upload guestlist in Social Tables.
- Pack event boxes.

## ■ Meeting: Logistics

- Invite: Development Officer, Director of Events, Event Planner, Events Admin. Coordinator, Comm. Coordinator, Senior Director of CDR, Unit Lead (Optional), Presidential Communications (Optional)
- Runs Meeting: Event Lead
- Discuss:
  - Events
    - Run of Show
    - Staffing Plan
    - RSVP Update
    - Logistics of Event
  - Marketing
    - Announcement Story
    - Video
    - Script Update
  - Donor Relations
    - Donor Recognition

★ = Event ■ = Meeting

# Post-Event Tasks



## Planner

- Upload all invoices.
- Assign admin. to pay invoices.
- Send all BB&T receipts to admin.
- Upload budget spreadsheet to tool. (Final Event Documents)

## Admin.

- Schedule debrief meeting.
- Upload debrief meeting notes.
- Pay all invoices- mark complete in tasks.
- Mark final attendees in Cadence.
- Close the event.

## ■ Meeting: Debrief

- **In Meeting:** Development Officer, Senior Director of Marketing, Comm. & Events, Director of Events, Event Planner, Events Admin. Coordinator, Director of Marketing, Communications Coordinator, Senior Director of Central Donor Relations, Unit Lead (Optional), Presidential Communications (Optional)
- **Runs Meeting:** Event Lead
- **Discuss:**
  - What went well?
  - What can we improve?
  - Follow Up from Announcement & Celebration Event

★ = Event ■ = Meeting