AΦ
FOUNDATION

Virtual Philanthropy Event

Toolkit for Collegians

Updated August 2020

Topics Covered

Virtual Event Logistics & Ideas

Pre-Event Tips

Virtual Event Components

Post-Event Tasks

Setting Up Your GiveSmart Event

Intro to Virtual Fundraising Events

During a time of uncertainty in our communities, many organizations are turning to virtual fundraising events to temporarily replace in-person events such as galas, competitions, and charity walks and runs. You can do the same by converting your Red Dress, Alpha Phifa, and other fundraising events to hybrid (part virtual, part in-person) or completely virtual events.

Alpha Phi Foundation wants to provide you and your philanthropy team with as much support as possible as you plan and execute a successful virtual philanthropy event, inspire others to give back, and share our mission with your new online audience.

NOTE
This toolkit covers the basics and shares ideas for hosting your virtual philanthropy events. As you and your chapter navigate and adjust to a virtual chapter experience, like hosting a virtual philanthropy event, know that Alpha Phi Foundation is adjusting to this new virtual landscape too! We are learning right along with you, and want to know of your successes and challenges.

Looking for a topic not covered in this toolkit? See Alpha Phi Foundation's website for more resources and the latest tips!

Why Fundraise Now?

Philanthropy is important now more than ever. There is so much your chapter can do to contribute to Alpha Phi Foundation's mission to advance women's lives through the power of philanthropy. We encourage our Alpha Phi sisters to continue fundraising for Alpha Phi Foundation to support our five focus areas: Women's Heart Health, Leadership, Scholarship, Forget Me Not Grants, and Heritage.

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Table of Contents

Click here to submit your event→

Things to Consider When Planning a Virtual Event

There are countless ways to give back! Each and every year, chapters craft up new and creative ways to support Alpha Phi Foundation. Before you start your virtual event planning, take some time to evaluate your chapter's goals, needs, and budget.

What do I want to accomplish?
Some events focus on education and raising awareness, like blood drives and spin classes. Others focus on fundraising, like auctions and 5K runs. Now...think about how you can accomplish your goals, *virtually*!

Many of your event can be converted to a virtual event. Determine which aspects of your event can be virtual and which cannot. Identify your goals and reverse engineer your philanthropy event success!

Who is our target audience?
- How do we reach our target audience?
- What do we want them to do—attend, give, share?
- How do we get them to care about our cause?
- How can we go above and beyond to engage them virtually?

When should we plan our event?
- Is there enough time to plan this event well?
- What does the chapter's social calendar look like? Campus calendar?
- Which dates are ideal for our target audience?

How can we make this happen?
- How can we involve the whole chapter?
- What is our budget? Do we need to spend any money?
- Will we need sponsors?
- Will we need to solicit in-kind donations?
- Should there be an entry fee or ticket?

Know that you can always consult your advisors or the Foundation staff—you are not alone!

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Virtual Event Idea Bank

This is just the start! There are countless events that can be successfully hosted as a virtual or hybrid event. Curate your events to match the needs and interests of your chapter campus and community.

If any part of your event is in-person, be sure to check your state and university guidelines for capacity limitations, required procedures, and safety precautions. Work closely with your advisors on well-thought out plans of action to address aspects of your event that may be in-person.

Consider the following events for your chapter to host virtually or as a hybrid event:

- Red Dress event
- Silent auction or live stream auction
- E-sports tournament (i.e. soccer, basketball, etc.)
- Talent competition
- Food event with contact-less or delivery options
- Local restaurant fundraiser with delivery and carry-out options
- Online merchandise profit-share events
- Blood drive (coordinate with a local blood donation center and have donors "pledge" Alpha Phi for their blood donation)
- Virtual walk-a-thon or 5K using Strava or another fitness tracking app
- Heart health awareness activities on social media
- Virtual bingo or trivia
- Zoom workout classes or educational guest speaker panels
- Virtual experiences (i.e. cooking class, local band, flower arranging, etc.)

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Hybrid Event Best Practices

If any aspect of your event is in-person, check out the following best practices to ensure that your chapter is taking all the necessary steps to have a safe and successful event.

- Take a step back to evaluate whether any aspect of your event must be in-person. Work with your advisors and sisters to determine whether you can properly host an in-person event that can be successful and where others feel safe and comfortable attending.

- Work closely with your advisors and House Corporation Board if you are planning to use your chapter's indoor or outdoor space for the in-person part of your event. There may be additional precautions in place that you need to adhere to.

- Check your state guidelines for in-person events and proper social distancing.

- Check CDC (Center for Disease Control) resources for recommendations on cleaning, sanitation, and maintaining social distance for your event.

- Check with your university for procedures and precautions for hosting events on-campus or at university-owned facilities. You may have to take additional health and safety measures beyond what the state requirements or recommendations.

- Have a back-up location if your first plan is not viable.

- If you have an in-person part of your event but believe you will struggle with attendance, consider new ways to keep the event entirely online.

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Pre-Event

Your virtual event will require just as much careful thought and planning. Be sure to think through every aspect of your virtual event, and prepare for every potential hiccup.

Event Logistics
A virtual event allows for new flexibility and creativity! Here are the keys aspects of your virtual event to think about...

When (Date/Time)
- Set a strategic date and time. Consider your state's phased reopening plan and evaluate how your target audience may be interacting with others. Are they sitting at home looking for something to do? Are they carefully going out with friends? A combination of the two?

- Consider your target audiences' current living environments and schedules when picking a date and timeline. Many people may still be working from home or distance-learning, while others may be essential workers working long hours or overtime.

    Example: Would it be more advantageous to pick a weekend date and evening time as usual for your Red Dress? Or would it be more beneficial to experiment with online bidding for your auction that is open throughout the week?

- Are there any important dates or events coming up that would help you engage more people? Use that dual opportunity to your advantage and give your audience more of a reason to celebrate and fundraise with you.

Where (Event site/Hosting platform)
- **GiveSmart** — GiveSmart is the _recommended event platform for Alpha Phi chapters_ to sell event tickets and collect donations. Nearly everything your chapter needs to host a virtual event can be done with GiveSmart such as:

    - Organize and categorize silent and live auction items

    - Host a silent or live auction complete with electronic bidding

    - Create and "sell" instant items

    - Register guests

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- Communicate via email and text with registered users
- Collected event's financial and guest information
- House key event information on event site page
- Presentation mode - NEW!

- **Third-party vendors like e-sports sites, and more** — Explore possible options of third-party sites that allow you to "host" your event. Ticket collection and donations should be acquired through an accompanying GiveSmart event. Work with your advisors and Alpha Phi's Health, Wellness, and Accountability Department to make sure the website is safe and complies with Alpha Phi policies.

- **Video chat and conferencing platforms** — Selecting the best platform for your event   may require some research. Determine what the virtual needs of your event are and work to find a platform to best meet those needs. Remember to consider:

  - Subscription cost
  - Participant limit
  - Time limit
  - Access to the platform by participants and audience

Who (Audience)

Your virtual event expands the pool of guests and donors to allow anyone anywhere in the world to participate. Keep in mind the type of event you are hosting and which audience may be more attuned to that event. Consider the following audiences:

- Family members
- Friends
- Greek community
- Other campus organizations
- Professional networks
- Chapter alumnae
- Local alumnae
- Alpha Phi volunteers (your advisors!)

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Building an Event Planning Timeline
Modify your event planning timeline slightly to apply to your virtual event. We recommend you start planning your philanthropy calendar at least 6 months in advance.

Here are some things to consider when building your event timeline:

If we're going to do it, let's do it right.
It's easy to get excited and start rushing through the motions, but remember event-planning takes time. Give yourself time to solicit donations and secure key sponsorships, to consider multiple venues and compare which is best, and to market your event well.

Consider all calendars and give plenty of notice.
To ensure the best possible attendance at your event, refer to your chapter calendar, Greek Life calendar, campus calendar, holiday calendar, etc. Pick a date that's smart and strategic. Send Save the Dates well in advance to make sure your attendees can, in fact, save the date!

Give yourself plenty of time to set up and design your GiveSmart event site.
There are some key steps you will want to ensure are in place prior to opening your event site for public view, like adding items, turning on the donation page, updating registration settings, and more.

Allow you and your team time to familiarize yourself with GiveSmart functions too, such as check in and check out, closing the auction, and sending messages.
You do not want to be caught unsure of what to do the night of your event! GiveSmart guides and webinars will be your best friend in preparing for your event! Login into your admin account for access to all GiveSmart resources.

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Communications

Efforts to connect with your audience and donors remain a crucial aspect of your event. A virtual philanthropy event loses the in-person touch points with your donors, <u>but can be made up through thoughtful and strategic communication elements</u>. Allow for plenty of time for promoting your event!

Here's an overview of the potential reach you have to your audience:

- **Invitations —** Whether digital or printed and mailed, a more formal invitation or save the date remains necessary for a larger event such as Red Dress Gala.
- **Email —** GiveSmart allows you to easily send emails to individual guests, groups of guests, or everyone.
- **Text —** GiveSmart allows you to easily send text messages. We strongly recommend quick texts here and there as opposed to one long email.
- **Social media —** Twitter, Instagram, Facebook

Social Media
- Utilize Twitter, Instagram, Facebook, and other favorite social media platforms.
- Post in your chapter's alumnae Facebook groups and alumnae newsletter
- Make an Instagram story highlight of your event
- Create event graphics for chapter members to easily share and post on their personal accounts.
- Tag Alpha Phi Foundation in your stories and posts! We want to support you as best we can! Visit Alpha Phi Foundation social media channels

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Sponsorships and Community Partnerships

Sponsorships are _non-tax-deductible_ contributions to your event and allow you to bolster your event budget. This is money for the chapter. If your chapter spends the sponsorship funds or keeps it in Billhighway for another use, the donor should not receive a tax receipt.

Even though your event is partially or completely virtual, asking for sponsorships is still a viable and recommended option. Sponsorships typically serve as a business transaction as they provide you with funds and you provide them with marketing and advertising, complimentary admission to your event, and other extra perks.

A key selling point for sponsorships for your virtual event is marketing and advertising! Work with your chapter's VP of Marketing to explore some virtual opportunities for marketing and advertising for your sponsorship partners.

Here are a few tips for soliciting sponsorships:

- Develop a list of local businesses to send sponsorship request letters and packets.
- Compose a team of chapter sisters to help you send letters and to follow-up with business contacts.
- Rework the sponsorship letter under Chapter Resources with your name, chapter and school, and event details. Be sure to outline the goals of your event, who to make the sponsorship check payable to, and where to mail the a check, if necessary.
- Follow-up with your list of potential sponsors by phone or email to thank them for their consideration and that you hope to hear from them soon.
- Know that not everyone will respond and opt to be a sponsor, and that's okay! Give your team plenty of time to send out a second (or third) round of letters and emails.
- Give businesses and companies the option to support you, while offering them some perks in exchange, even during the uncertain economics of COVID-19. Do not assume that they cannot or do not want to take advantage of this opportunity.

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In-Kind Donations

In-kind donations are physical items or services donated by a company, business, or corporation. _These items are tax-deductible for the donating party_.

Here is a list of possible in-kind donations you could be soliciting for:

- Silent and live auction items (themed baskets, tickets/vouchers to future events, subscription services, travel)
- Ingredients or prepared food (food event)
- Services (cooking demonstration, live music)
- Marketing materials (printing, ad space, etc.)

Additional Event Activities

- Electronic auction
- Live stream auction
- Event speaker or panel
- Chapter video or Alpha Phi Foundation YouTube videos
- Trivia/bingo/Jeopardy-style games
- Informational presentation
- Chapter member speakers and testimonials

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Finances and Expenses

Virtual events tend to lead to a decrease in expenses since many of the expenses of an in-person experience are significantly reduced or eliminated entirely. Utilize the best practices below and be sure to work with your VP of Finance and advisors to ensure you have a handle on event finances.

- Encourage or require a flat donation in exchange for participation instead of setting a ticket price.
- Always remember the golden rule of event planning: your ticket price multiplied by the total # of guests should be equal or greater than your total event expenses.
- Make a list of items you need to purchase in order for this event to be successful.
- Solicit for in-kind donations and sponsorships, if possible, to off-set any expenses you do accrue.
- Factor in whether you need to mail anything. USPS or a packaging service. Depending on the volume of what you need to mail, it can get expensive.

Risk Reduction & Safety

Alpha Phi International Fraternity's Risk Reduction & Safety Philosophy seeks to empower individual members to make informed decisions and expects personal responsibility from its members through local self-governance. As with any type of event, a chapter is expected to adhere to all Alpha Phi policy and country, state, province, county and city laws, and make every effort to ensure a safe environment.

Working collaboratively with your Executive Council and advisory team is essential to mitigate risk in the planning and execution of a virtual event. As a team walking through all components of the virtual experience will aid in a smooth and successful event.

Virtual events do not need to be and will not be an exact replica of an in-person event. We already experience virtual events—a perfect example is through watching a sporting event on television. There are many elements to watching the game that allow us to feel as if we are a part of the game. When planning and executing a virtual event, we not only have to create the content, but we also must create a conducive environment that is enjoyable for the participants.

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Alpha Phi International Fraternity has published multiple resources on the virtual experience on alphaphi.org. Two specifically to highlight are the Virtual Member Experience and Tech Tools for a Virtual Experience. There is also a plethora of other published resources on virtual programming, sisterhood and recruitment.

Safety and Security
As with everything Alpha Phi does, members' safety needs to be the first thing on our minds when planning for any event. Here are a few safety and security considerations when planning a virtual event:

- Participant expectations should be outlined at the outset of the virtual event. By sharing guidelines, this allows for all participants to be held to the same standard of conduct. These expectations should also be communicated in writing during the registration process.

- Recording your event is a great way to be able to share the virtual experience outside of the live stream. Ensure that you notify participants at registration that the event will be recorded. Remind participants again at the opening of the event and clearly communicate where the event recording will be saved and shared.

- Playing online video games for an event such as Alpha Phifa or Hoops for Hearts may be something that your chapter is interested in hosting, but it is important to be aware of the Terms of Use outlined in these online platforms as they are often more intricate than a standard contract. Privacy is an inherent concern in online gaming as sometimes access to the computer microphone and/or video camera is required or requested. Some companies sell relevant information they've collected about a participant to advertisers and others collect data for their own purposes. Being upfront to your participants about privacy during their virtual experience is essential.

- PRO TIP: When online gaming, make sure the Terms of Use agreement with the vendor is reviewed by our insurance partner, Holmes Murphy, prior to committing to any one platform.

- Many institutions and/or states/provinces have gaming and/or gambling restrictions and may even prohibit certain activities. Because a virtual event is considered a chapter event, the chapter would be held to these same restrictions and associated policies. It is critical that these policies are reviewed prior to planning to ensure that the type of event that you want to host is feasible.

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Technology Platforms

Selecting the right platform for your virtual event is key in creating the desired experience and meeting the participant outcomes. Here are a few technology considerations when planning a virtual event:

- Regardless if you use one of the outlined platforms or something else you discover in your planning, select a platform that includes security features.

- Zoom is a great platform option for hosting a virtual event. Make sure someone in your chapter has a Pro account or check if you are able to use an account through your academic institution. The Free version of Zoom will only allow meetings of up to 40 minutes, so you need to have the Pro version to ensure your event is not interrupted or cut off.

    - Utilizing the Password and Waiting Room features on Zoom will ensure that the event is more secure. Create a unique password for the event. The Waiting Room allows you to admit only the people who have registered for the event, so if someone appears who should not be there, you can choose to not let them into the meeting.

    - Designate more than one person to be the host. Especially if you are on Zoom, having more than one host will allow more than one person to help navigate any technical difficulties if they should arise, minimizing any interruptions.

    - If you are using a Zoom account that is owned by your academic institution, you should ensure you are aware of any institutional obligations and expectations related to conduct, recording, or access, and communicate these accordingly.

- YouTube is also a great platform option that enables users to make a private live video and share it with a specific audience. However, it does not allow for views to be added after a private live stream has started. The chat stream in YouTube is placed in its own window.

- Facebook is another platform that can be used through Facebook Live which could be done through a group or event page. Facebook keeps the chat stream and the live video in the same window which is helpful for moderation.

- For more information, check out Alpha Phi International Fraternity's resource on Tech Tools for a Virtual Experience on alphaphi.org.

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Holmes Murphy Insurance
All contracts, prior to signing, should also be reviewed by Alpha Phi's insurance provider, Holmes Murphy. Holmes Murphy reviews documents for equitable language and provides feedback that you can go back to the vendor to request changes if needed. When you receive an agreement or contract it's a simple process to have our partners review. Email holmesmurphy@alphaphi.org your name, phone number, chapter name, and contract along with any deadline and request a contract review.

Event Agreements: Vendor, Contracts and Terms of Use
Agreements related to virtual events are often unique and may differ greatly from a traditional in person event. As a part of planning your event, agreements could be in the form of a vendor agreement, a traditional contract and/or a Terms of Use agreement. Please do NOT sign any document or make a commitment through the creation of a chapter account without advisor review. The Chapter President is the only officer that should be signing contracts and agreements.

When planning a virtual event, many times a Terms of Use agreement would be utilized instead of a contract. Terms of Use or Terms of Service are legal agreements between a service provider and a person(s) who wants to utilize that service. The signer must agree to the abide by the outlined Terms of Service in order to use the offered service. We highly recommend all Terms of Use agreements be shared for review with our insurance partner, Holmes Murphy, prior to signing or creating a chapter account.

Tax Implications
Digital experiences can be taxed just as in person services. Many states/provinces are beginning to broaden the sales tax base in order to generate revenue and the technology arena is highly sought after. In a virtual experience, when paid ticketing or registration is involved and there is a monetary exchange, be aware of who pays the tax.

Copyright
Copyright refers to the legal right of the owner of intellectual property. When planning a virtual event, ensure that you are providing the copyright information and giving credit where credit is due. Exploiting the copyright of a company may result in legal action against the chapter or an individual.

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Event Accessibility
When hosting a virtual event, there are many accessibility considerations that must be considered before the event goes live.

- When sending an invitation, ensure that all images and logos have image alt text.
- Ask participants of any accommodation needs during the registration process. Review each submission and have a plan set in place to accommodate.
- Ensure all documents are accessible by sharing visual presentations or content prior.
- Provide live captions during the event.
- Set expectations for any speakers during the event such as speaking clearly, using plain language, and describing visuals.
- Offer live support during the event. This could be in a chat feature.
- Save and offer transcripts from the event.
- Provide captions for the recording after the event.

Event Planning Guide (EPG)
The Event Planning Guide (EPG) provides a framework of questions for conversation about planning all events, including virtual events. This guide should be an opportunity for advisors and officers to have detailed structured conversations about events that are planned by the chapter.

The goal of the EPG is to help the officer think critically about event planning. In addition to this Guide, please make sure that you also review and comply with the International and campus risk management policy as you plan an event, including submitting any required campus documentation within an appropriate timeline.

The officer responsible for planning the event should complete the Event Planning Guide at least two weeks prior to the event so that the appropriate advisor has adequate time to review.

Questions
If you have any further questions on risk-related matters in the virtual event experience, please reach out to the Health, Wellness, and Accountability team at the Executive Office at wellness@alphaphi.org.

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During Events

Schedule of Activities
Even though your event is partially or completely virtual, keeping a clean schedule of activities is key to a smooth run of show. If there are structured activities you want your guests to participate in, establish a event program ahead of time and make it available to your guests with plenty of advance notice.

> *Example: during your virtual Red Dress Gala, you have a scheduled Foundation speaker at 8:00 PM before your auction closes. Include this time-sensitive activity on your GiveSmart event page and on the invitation so your guests know what to expect. Sending out a quick text to guests prior to the event speaker will also help keep your guests' attention and ensure optimal attendance.*

Registration
When using GiveSmart, registration is required for attendees to participate in any virtual activities on the platform, including bidding in the auction, making a donation, or purchasing an instant item. Set a specific date and time for your event site to "open" for viewing and allow guests plenty of time between this date and your event date to register.

Alternatively, if you collected guest RSVP's a different way, upload your list complete with names, email, and mailing addresses into *Users* prior to the event.

Virtual Auction and Items
The GiveSmart auction feature makes hosting a virtual auction easy! Here are some best practices to set you up for success:

1. Upload your items with the name, starting bid, full description, and fair market value (FMV) ahead of time.

2. Take pictures of the items! Since your guests cannot see the items in-person, providing high-quality photos and detailed description helps make their experience exciting!

3. Make your guests aware of *auto-bidding*.

4. Require a card on file.

5. Close and reconcile the auction as soon as possible.

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6. Develop a plan for how auction and item winners will receive their purchases prior to the event. Whether the chapter mails out items with a thank you note or schedules contact-less pick-up times for each person, a well-thought out plan will help this post-event task run smoothly.

7. Preview your items to generate excitement with guests. Encourage viewing prior to the event and allow guests the chance to plan their bidding.

Event Speakers
Educating guests and donors about the mission and work of Alpha Phi Foundation creates transparency and allows guests to hear about impact from someone who strongly believes in our work whether it be a staff or Board member, volunteer, or dedicated donor.

Fill out the Submit Your Event Form and check *YES* if you would like a speaker at your next event! Submit the form _at least six weeks prior to your event_ to allow for staff to coordinate a speaker for your event date.

Videos and Visual Aspects
Sharing impact videos and other visual aspects during your event adds a layer of engagement to your virtual event.

Prepare to show a video from Alpha Phi Foundation or a chapter video you created! Share the work of the Foundation and the amazing work *your chapter* is doing to raise funds and awareness for the five program areas! Check out Alpha Phi Foundation's YouTube channel for our latest videos.

Checking in with Guests
Losing the physical connection with guests does not mean you are missing an opportunity to engage with them during the event! Utilize GiveSmart text messaging and emails to send any type of update, reminder, or question.

Collecting Donations
Collecting donations for your event can be made secure and simple by using GiveSmart for your event or directing donors to the Chapter Event Donation Form. Using either of these options allows donations to come directly to Alpha Phi Foundation in a quick, safe and easy way.

GiveSmart is free for Alpha Phi chapters to use and optimize their events, whether virtual or in-person. The credit card transaction fee is a standard 3.5%.

Please refrain from using Venmo to collect donations for Alpha Phi Foundation. Credit card donations are easily accepted via GiveSmart or Alpha Phi Foundation's online chapter event form.

Using a third-party site to fundraise for Alpha Phi Foundation is not recommended. Sites such as GoFundMe, EventBrite, and CrowdChange take longer to send proceeds to Alpha Phi Foundation, take a larger percentage in fees, and will prolong chapter donation reports from Alpha Phi Foundation.

If a chapter chooses to use a third-party site to fundraise, Alpha Phi Foundation will have limited oversight and support to offer to chapter members. Please direct any troubleshooting and issues with third-party fundraising sites to the Help Desk or Support Staff of the third-party vendor.

Post-Event

You've completed your virtual event, congratulations! Here are a few items to help wrap-up and complete your event before it is officially over:

GiveSmart Finances
If you collected event funds primarily through GiveSmart, then wrapping up finances can be quick and simple: [Click here to the next steps for properly closing your GiveSmart event and receiving your funds](#).

We are often asked which GiveSmart revenue types are directed back to the chapter and which are donated to Alpha Phi Foundation.

> **Tickets —** Once you close your event and request disbursement, any ticket sale revenue collected will be mailed to your chapter's Billhighway account. You can expect to see these funds coded in your account 2-3 weeks after you submit your disbursement request.

> **Donations —** Once you request disbursement for your GiveSmart event, donations will be sent directly to Alpha Phi Foundation. There is no extra step on your part!
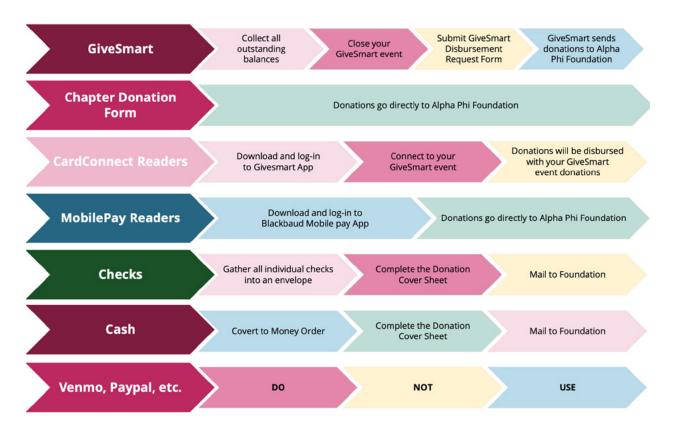
> **Instant items —** Instant item revenue is classified as donations. These funds will be sent directly to Alpha Phi Foundation.

> **Auction items —** Auction item revenue is classified as donations. These funds will be sent directly to Alpha Phi Foundation.

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Sending in Donations

For all other avenues of donations, here is how you can safely and responsibility send these in to the Foundation:

GiveSmart	Collect all outstanding balances	Close your GiveSmart event	Submit GiveSmart Disbursement Request Form	GiveSmart sends donations to Alpha Phi Foundation
Chapter Donation Form	Donations go directly to Alpha Phi Foundation			
CardConnect Readers	Download and log-in to Givesmart App	Connect to your GiveSmart event	Donations will be disbursed with your GiveSmart event donations	
MobilePay Readers	Download and log-in to Blackbaud Mobile pay App	Donations go directly to Alpha Phi Foundation		
Checks	Gather all individual checks into an envelope	Complete the Donation Cover Sheet	Mail to Foundation	
Cash	Covert to Money Order	Complete the Donation Cover Sheet	Mail to Foundation	
Venmo, Paypal, etc.	DO	NOT	USE	

Stewardship

Thank your donors again and again for their time and contributions to your event! Stewardship is a simple, yet important way to maintain trust between you (and Alpha Phi Foundation) and your donors.

- Send a quick thank you email, along with an automatically generated tax receipt for their contributions, using GiveSmart's email feature.

- Mail thank you letters and tax receipts generated using GiveSmart.

- If you have silent/live auction items, or other winnable items to mail, develop a plan for getting those items to their purchasers whether it be through a scheduled pick-up time or mailing packages. Include a thank you letter or note along with the package!
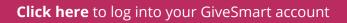
Click here to submit your event→

GiveSmart

GiveSmart is the recommended platform for Alpha Phi chapters to host their virtual, hybrid, and in-person events.

Be sure to give yourself and your team plenty of time to become comfortable and knowledgeable about using GiveSmart for whatever features your event requires. Reach out to chaptergiving@alphaphifoundation.org to ask questions or schedule a training session with our Chapter Giving Coordinator.

To access all of the GiveSmart ZenDesk resources, log into your chapter account:

Click here to log into your GiveSmart account

Here's where to start...

Does my chapter have an account?
Are you unsure if your chapter has a GiveSmart account already set up? Complete the Submit Your Event Form to find out!

If your chapter does not have an account set up already, GiveSmart staff will create your Chapter Hub and the event that you submitted. Be sure to list anyone you want to have administrative access to the site, including your advisors! Everyone will receive their own login credentials and will have full administrative access to the chapter account.

Since your event will already be created by GiveSmart staff, be sure to check out the Getting Your Site Ready list at the end of the GiveSmart section to make sure your event is ready for the public!

My chapter already has an account!
You have already logged into GiveSmart or created an event before, awesome!

To create a new event, follow these steps:

1. Login into e.givesmart/s/e
2. Select *+New Campaign*
3. Select *Campaign Type* — always select *Auction Campaign* so your event has full capabilities no matter what! Choose any option for *Campaign Sub-Type*
4. Choose your *Campaign Name* and *Name for Text Messages*
5. Enter in *Location, Start Date and Time, End Date and Time* and *Approximate Number of Attendees*.
6. Select YES to the following: *Donation Appeal, Live Auction, Vote Items, Instant Buy Items.* This gives your event full site capabilities whether you end up using them or not. Better to be covered now than have to recreate your event site later!
7. Select all options under *Types of Instant Buy Items.*
8. Add an *Approximate Number of Items*
9. Choose when *Ticket Sales Begin* and *Ticket Sales End*. You can always change this later. If your event does not require ticketing, select any dates.
10. Select NO for *Onsite Staff.* Email chaptergiving@alphaphifoundation.org if you think your event requires on-site assistance.
11. Hit *Save* and your new event is ready for customization!

My chapter has an account, but I've never logged in before...
No worries! Reach out to chaptergiving@alphaphifoundation.org to become an admin.

You will be added to your chapter's account and receive your login credentials shortly. Once you create a password, you can log-in and start getting familiar with GiveSmart.

Click here to submit your event→

Getting Your Site Ready

Before going live, you will want to make sure all aspects of your event site are checked off and ready to go! Your event will heavily rely on GiveSmart in a way your in-person event may not have, so prepare accordingly. Adjust your to-do list based on the type of event you are hosting, too, as some things won't apply!

Here's a list of GiveSmart settings, customizations, and things to consider to get you started!

Settings > Global
- Assign bidder numbers
- Keep bidder and purchaser names anonymous
- Add custom fields to guest registration
- Toggle site from Hidden to Show and vice versa.
- Require card on file
- Request email and mailing address for registration
- Option to pass credit card transaction fees onto organization (chapter and Alpha Phi
- Foundation), pass onto purchaser, or make it optional.

Setting > Design Center
- Customize colors
- Add a background picture and banner
- Turn on/off Call to Action buttons
- Add a Donation Revenue Goal
- Update Campaign Details
- Create Ads
- Write additional Descriptions
- Rearrange layout

Click here to submit your event→

Setting > Auction
- Toggle on/off Item View Page
- Set a Go Live and End date and time
- Adjust the bid increment and default starting bid percentages

Setting > Donations
- Show/hide Donate Page View and Click to Donate from your home page
- Show/hide Donate Now page
- Write donate description
- Set donation levels

Setting > Communications
- Generate a PDF of user statements
- Generate receipts and tax letters
- Create Welcome Text Message for new users
- Write customized tax letter

Setting > Close and Wrap Up
- Close your auction at the end of your event!
- All auction wins will be converted into purchases and those winners with credit cards on file will automatically be charged.
- Reconcile your auction!
- Utilize Run All Credit Cards to charge remaining users for their completed purchases.

Users
- Share the registration link with guests OR upload the guest list via Excel
- Check in and check out users
- View unpaid balances for a specific guest
- Refund a specific guest
- View guest activity and information
- Manually add a user

Click here to submit your event→

Tickets
- Create tickets and prices
- Add required questions for ticket purchase orders
- View and create ticket orders
- Return and refund tickets

Items
- Create all items with a description, picture, starting bid, fair market value, and minimum bid increment.
- Manage all items
- Manually enter winners

Messages
- Create and send email messages to an individual, a group, or all users
- Create and send text messages to an individual, a group, or all users
- Save messages as drafts to send immediately or later

Ads
- Create ads to be viewed on the public event page

If you ever need additional assistance or have a quick question, we recommend clicking the Help button in the lower left-hand corner of your dashboard. GiveSmart's Help Desk has created countless instructions, articles, how-to's, and videos to help you learn your way around this tool.

Click here to submit your event→

Foundation Content

Sharing the mission and vision of the Foundation is imperative to a successful and informative philanthropy event. Being upfront and transparent with your donors from the beginning lends itself to getting your guests on board and excited about your philanthropic goals – to raise money and awareness for the Foundation! Here are some easy-to-share and informational pieces!

- 2020 State of the Foundation video (See Alpha Phi Foundation YouTube Channel)
- The latest Donor Impact Reports
- News (Blog)
- Alpha Phi Foundation About and Mission
- 2020-2021 Foundation Scholars Announcement
- Recent Heart to Heart Grant Recipients and News

Additional Resources

Be sure to check out Chapter Resources on Alpha Phi Foundation's website for the following essential forms and guides!

Find the Submit Your Event Form, Philanthropy Toolkit, Best Practice guides, GiveSmart Disbursement Request Form, Event Summary Form, Chapter Event Donation Form, past Chapter Newsletters, and more!

Click here to go to Alpha Phi Foundation's Chapter Resources