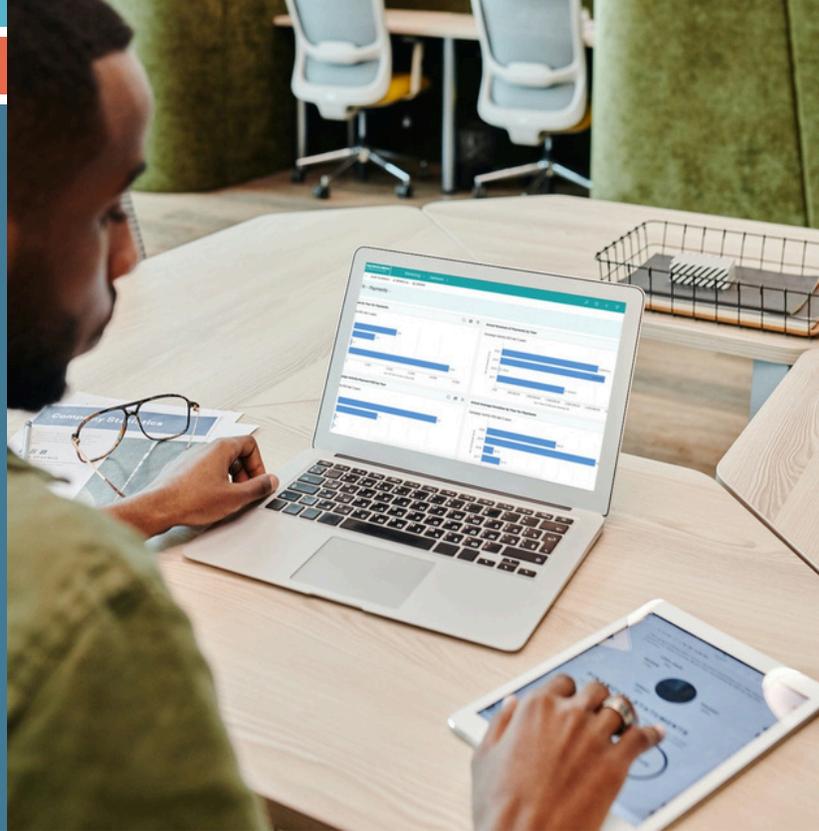


Nonprofit Event Planning Checklist



1 Define Strategy and Objectives

- Set measurable goals, including revenue targets, registration numbers, donor conversion rates, and volunteer hours.
- Identify primary and secondary audience segments (e.g., current donors, prospective donors, corporate sponsors).
- Align event purpose with organizational mission and donor interest categories.

Use StratusLIVE 365 CRM's "Interests" feature to align constituents with specific designations, events, and volunteer projects based on historical behavior.

- Determine performance indicators for post-event evaluation.

2 Determine Event Scope and Format

- Select format: physical, virtual, or hybrid.
- Establish venue or platform requirements, including accessibility and capacity.
- Identify revenue sources (e.g., tickets, direct donations, team fundraising, sponsorship).
- Define core program elements, including speakers, entertainment, and breakout activities.

Use Ignite to create and manage event types, configure page content, assign fundraising goals, and define volunteer roles.

3 Build Event in StratusLIVE Ignite

- Use Page Designer to build the event landing page. Configure it to include branding elements, registration forms, and content.
- Create registration levels, pricing tiers, custom questions, and deadlines.
- Activate features including donation enablement, DIY and team fundraising, and volunteer shift sign-up.
- Publish automated confirmation, reminder, and post-event follow-up emails.

All registrations, donations, and engagement data will sync with StratusLIVE 365 CRM if integration is enabled.



4 Promote the Event

- Create segmented marketing lists using StratusLIVE IQ based on prior attendance, giving history, or engagement scores.
- Execute outreach through email, social media, or direct mail channels.
- Monitor campaign performance using real-time dashboards and analytics in StratusLIVE 365 CRM.

Use Ignite campaign tools for email distribution, fundraising page links, and registration CTAs.

5 Manage Sponsors, Partners, and Volunteers

- Register and track corporate sponsors using sponsorship records in StratusLIVE 365.
- Use the Partner Agencies module in Ignite to invite and coordinate with affiliated nonprofits.
- Set up volunteer projects and activities. Assign volunteer roles and capture shifts using Ignite or CRM.

Track volunteer time and role fulfillment using the Volunteer Activities module in StratusLIVE 365 CRM.



6 Enable Donations and Process Payments

- Configure donation types (one-time, recurring, in honor/memory) in Ignite.
- Enable payment methods: credit card, PayPal, Google Pay, Apple Pay. Stripe is supported as the primary processor.
- Set up secure receipting and acknowledgments using CRM templates or Ignite messaging tools.

Transactions are tracked in both Ignite and CRM. Financial data can be summarized for GL integration.

7 Monitor and Adjust in Real Time

- Use Ignite dashboards to monitor registrations, revenue, volunteer commitments, and engagement.
- Use StratusLIVE 365 dashboards and reports to view campaign ROI, fundraising metrics, and donor activity.
- Adjust marketing or operational tactics as necessary based on available data.

8 Execute the Event

- Finalize logistics including check-in process, staffing, and signage.
- Enable day-of giving through QR codes or live giving prompts.
- Ensure all data (registrations, donations, volunteer hours) are recorded in CRM or Ignite.

Event attendance and contributions are automatically linked to constituent profiles in CRM.

9 Conduct Follow-Up and Stewardship

- Distribute thank-you emails, tax receipts, and impact summaries using Ignite's messaging or CRM mail merge.
- Invite attendees to join a Community Group in Ignite or follow future events via Donor Hub.
- Encourage further engagement by recommending giving opportunities based on constituent interests.

Use Donor Hub to give supporters access to past gifts, upcoming events, and news.



10 Analyze Results and Nurture Leads

- Use campaign ROI dashboards to compare outcomes to initial goals.
- Add newly engaged participants to drip email sequences or donor development workflows.
- Apply segmentation and engagement scoring to determine next best actions.

Data from Ignite and CRM can be used for predictive modeling and donor journey mapping via StratusLIVE IQ.