



Guidelines for Impact Events

In consideration of the enthusiastic volunteers and local businesses who propose events for our membership, and with respect for our leadership's time (primary focus is grant-making with a social component as opposed to a social club that makes grants), it is necessary at this stage of our development to create event guidelines.

- Our Events Calendar can get overloaded creating the need for careful evaluation and consideration for all proposals for the best turn out and to maintain the value of our membership experience. See appendix for potential events already scheduled for this Season.
- Whenever possible, events should reflect and promote our core mission of making local grants in the following categories:
 - Family
 - Environment and Animal Welfare
 - Health and Wellness
 - Arts and Culture
 - Education
- We would like to keep our Impact-wide events to one to three per month (does not include Community events).
- Events that include a Grant Recipient will have priority, in accordance with guidelines that respect the fair and level playing field necessary during the grant-making cycle.
- Events in private homes and communities are encouraged for their proven value at membership engagement and recruitment.
- Sponsors will also receive priority for event ideas.
- We also value unique event ideas that allow our members to engage with one another in a way that they might not otherwise be able to.

- Sip and Shops should support Impact sponsors or other strategic partners, where possible. We ask that they involve either a 10% of net sales donation (preferable) or offer a 10% discount to participants at the event. Sip and Shops will primarily be most appropriate as Community events.
- Hands-on volunteer events with grantee recipients are also highly encouraged.
- All event ideas should be presented to Christine DeVecchio for review, after which, if the event concept meets the initial criteria and based on the existing event schedule, she will share it with the Community Captains Coordinators and Impact President and Vice President for final approval.

Process for Impact-wide events:

- Review and provide answers on Events Concept Approval Form, see next page. Then submit this form to Christine DeVecchio (christine.delvecchio@bofa.com) for review.
- If approved and this is an Impact-wide event for publication on our website, Christine will forward you the Events Communications Form (see example on page four) to fill out for submission to Melissa Haley at melissahaley55@gmail.com.
- Melissa will review all of the information in detail and make sure that all information is correct, check spelling, check Zoom link, and then add it to the event page of our website.
- The Communications team may be asked to include the event in our social media plan.
- The host should confirm all of the information is correct on our website. We ask that the host request the RSVP list and contact the RSVPs 2 days before the event to remind them and confirm. These requests should be sent to Melissa Haley at melissahaley55@gmail.com or another one of our WIX administrators.
- Example of timeline for submission/communications

June 1	submit approval form
June 8	once approved, submit events communications form and event will be posted on the Impact Website and App events page for RSVPs.
June 15	event appears in newsletter
June 30	event appears in calendar e-mail
July 7	EVENT!

- Review and provide answers on Events Concept Approval Form, see next page. Then submit this form to Christine DelVecchio (christine.delvecchio@bofa.com) for review.

Community Events:

- Community events should generally follow similar guidelines. An Events Concept Approval Form should also be completed and submitted to Christine (christine.delvecchio@bofa.com) for review and to check the date so as to avoid conflicts.
- Captains will be given more leeway to create an experience unique to their communities. They should consider two-to-three events per giving cycle. For example, one set of Captains proposed: one Sip n' Shop social gathering, one event involving a grant recipient, and one casual event like a stroll on the beach or a monthly coffee at a coffee shop in their neighborhood.
- An important requirement for these Community events will be that someone from the leadership team be included, if possible, to provide an update on Impact, Impact grants, and/or whatever Impact news will be of interest to members and potential members.

For all Events – Thanking Sponsors – We would like to recognize our sponsors at each event. We would appreciate it if you can put the sponsors on a slide if you are doing a slide presentation. You can get the slide from our Chairs for Sponsorship. If the event has a specific underwriter be sure to thank that sponsor. If you are doing an in-person event, you may want to invite a sponsor to speak for one minute at the event. Please reach out to our Sponsorship Chairs to identify a sponsor who would like to attend the event.



Impact Events Concept Approval Form

Please fill out this form and send to Christine DeVecchio at christine.delvecchio@bofa.com.

For inclusion in our newsletter, please submit this event form by the 1st of the month. For inclusion in our calendar e-mail, please submit by the 16th. This will allow enough time for approval and completion of the communications/posting process. Please allow three to five weeks lead time to properly promote an event.

Host/Meeting Leader:

Are you a member of Impact the Palm Beaches?

Event concept:

- 1.) **Indicate which of our 5 giving values does the event underscore: Family**
 - a. **Environment and Animal Welfare Arts and Culture**
 - b. **Education**
 - c. **Health & Wellness**
- 2.) **Sponsor involvement: Yes or No If Yes, please describe:**
- 3.) **Strategic partner involvement: Yes or No If Yes, please describe:**
- 4.) **Grantee recipient involvement: Yes or No If Yes, please describe:**
- 5.) **Key participants:**
- 6.) **Day of the Week/Date/Time:**
- 7.) **Location:**
- 8.) **Is this a free event or an event involving a paid reservation?**



Impact Events Communications Form

Please fill out this form completely and send to Melissa Haley at melissahaley55@gmail.com.

For inclusion in our newsletter, please submit this event communications form by the 8th of the month.

For inclusion in our calendar e-mail, please submit by the 23rd.

Please allow three to five weeks lead time to properly promote an event.

- 1. Name of Host(s)**
- 2. Host email and phone (in case guests have questions).**
- 3. Designate if this is an RSVP event or a ticketed event. If ticketed provide Eventbrite link.**
- 4. Do you need a ZOOM set up or will you provide a ZOOM link?**
- 5. Would you like a Grant recipient or Sponsor to speak at your event?**
- 6. Is there a maximum capacity for this event and if so, what is it?**
- 7. Name of your event:**
- 8. Day of the Week/Date/Time:**
- 9. Name of Venue:**
- 10. Venue Address:**
- 11. Short Description (maximum 300 characters):**
- 12. Please attach a photo to the email in a .jpeg format. Square (Instagram template) photos work best. Please do not embed the image into the events form.**
- 13. Any other long description (bio, Instructions, etc.)**
- 14. Would you like the reminder e-mail to go out 1 day or 3 days prior to the event?**