rsvpify

Ultimate Guide for Debriefing Your Fundraising Event

A free guide to debrief your event from operations to outcomes

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About RSVPify

RSVPify has been partnering with nonprofit organizations for the last decade, helping them create seamless event registration, ticket + table selling, and check-in experiences. Plan your gala, instill donor confidence, and raise more funds for your mission with RSVPify. Join the thousands of nonprofit partners like you who are looking to level-up their fundraising events.

Get started for free at rsvpify.org, and reach out to Laura, one of our NPO experts at laura@rsvpify.com for complimentary unlimited access to RSVPify through the end of 2024. Choose RSVPify to host your next fundraiser, board meeting, community celebration, staff training, and more. From invites to registration to seating to check-in, let RSVPify simply your event management so you can focus on your mission.
Your Mission. Our Software.

About this Template

So your event is over — what's next? Time to debrief!
At RSVPify, we call the event debrief an event retrospective ("retro" for short). New to retros or looking to improve your existing debrief format? Use this free template to guide your conversation. In the following pages, we'll cover:

- Why Retro?
- Quick Intro to Retros
- Retro Prep
- Retro in Action
- Using the Retro for Planning Your Next Event

Questions, comments, and more? Reach out to us at the live chat at rsvpify.org. We're happy to help!

Introduction

Why Retro?

The purpose of a retro is to give your team a chance to come together and reflect on what went well and what can be improved for the next event. By looking across many areas — like financial results, attendance, marketing efforts, and overall logistics — teams collectively celebrate successes and learn from any challenges faced.

A retro is a place for open and constructive dialogue, and when done well, the event retro is a team-building and event buy-in activity. When your team can reflect together — **creating shared memories of success and opportunity**, they can also plan for the future together — **creating shared expectations for your next event**.

When's the best time to retro your fundraising event?

A week after the event is the perfect time for an event retro. Your team's event sentiment is still strong, but you're not coming off of the post-event high. You also can recall specific important details about the event to make recommendations for next year.

Who should attend the retro?

For the most inclusive retro, invite anyone who had a direct hand in the planning or execution of the event. If this makes your group quite big, you might consider hosting separate retros for more focused conversations — e.g., one retro for day-of operations (where you include a volunteer lead, check-in lead, technical + IT support, etc.) and another retro for fundraising (where you include your board, event committee, etc.).

Quick Intro to Retros

Retros are similar to key stakeholder brainstorms and team ideation events. They are collaborative meetings where participation is expected by all. They also require clear goals, roles, and preparation.

Retros are typically organized in three or four parts. In this template, we'll talk about the four-part retro (the one that ends with kudograms!).

PART 1:

The first part of the event retro outlines roles, goals, and ground rules.

- The **roles** are a readout of who does what during the conversation — e.g. facilitator, notetaker, participant role and expectation there.
- The **goals** are a readout of retro goal and a recap of the original/intended event goal(s). At this point, an initial report on goals is also shared (e.g. dollars raised, stewardship conversations had, attendee makeup, etc.).
- The **ground rules** typically outline values that are to be upheld in conversation - creating a safe and shared space for participants.

Sample retro ground rules you're free to use in your retro:

- **Communication**: We value active listening and the sharing of diverse perspectives and ideas. Team members may be asked to participate more or practice more active listening.
- **Collaboration**: We have the same goal here. Let's make sure that ideas presented note the benefits and tradeoffs and decisions made adequately consider both for the overall good of the team.
- **Accountability**: We hold every team member accountable for their commitments and actions. We take ownership of mistakes and learn from them, fostering a culture of responsibility.
- **Positivity and Motivation:** We maintain a positive and motivated team spirit. We encourage and support each other during challenging times, creating a supportive work environment. If we notice comments are unproductively negative, we will call this out and allow a different, smaller environment to process these comments.
- **Appreciation:** We understand that all team members worked on a mix of interesting, hard, and - sometimes - mundane event tasks. We need to highlight the work and flows across teams so we can have insight into their workload. We express appreciation via kudos, most likely during retros.

PART 2:

In Part 1, you lay the groundwork for the retro conversation; part 2 is where the action happens! It is the heart of the event retro; it happens in three stages; and it is timed.

- First, all attendees **make observations** about the event — by whatever pre-planned variables/categories you decide are helpful. Observations fit into one of four categories — things to celebrate, that worked well, that didn't work well, and ideas for the future — and you can pick the best categories. In general, you ask the participants to focus on their area of expertise — e.g., ask the marketing team to comment on event comms, sponsorships, media coverage, etc. and the finance team to take about collecting donations, app fees, reconciliation, etc.

Here are three sample setups you might use to sort observations. Note that in practice, you select only one set of four categories to retro.

Sample Setup 1: Roses, Thorns, Buds, and Seeds

- **Roses** (What were the highlights and successes?)
  - The best parts of the event, including successes and what went exceptionally well.
- **Thorns** (What were the pain points or problems?)
  - Difficulties, setbacks, or aspects that caused frustration or did not work well.
- **Buds** (What are the promising areas for growth?)
  - Emerging opportunities, new ideas, and areas that showed potential for future development.
- **Seeds** (What needs to be planted or nurtured for the future?)
  - Actions, resources, or strategies that should be implemented or cultivated for future events to improve outcomes and success.

Sample Setup 2: Mountains, Valleys. Rivers, and Bridges

- **Mountains** (What were the high points and successes?)
  - Major achievements, high points, and successes that stood out during the event.
- **Valleys** (What were the low points or challenges?)
  - Difficulties, setbacks, or low points that negatively impacted the event.
- **Rivers** (What flowed smoothly and went as planned?)
  - Processes, activities, or aspects of the event that went smoothly and according to plan.
- **Bridges** (What helped us connect and overcome challenges?)
  - Solutions, strategies, and resources that helped overcome challenges and connect different aspects of the event effectively.

Sample Setup 3: Flames, Sparks, Ashes, and Embers

- **Flames** (What burned brightly and fueled our success?)
  - Key elements that drove the event's success and stood out as major positives.
- **Sparks** (What ignited new ideas or opportunities?)
  - New ideas, opportunities, and innovations that emerged during the event.
- **Ashes** (What failed or needs to be left behind?)
  - Aspects that failed or didn't work well and should be reconsidered or abandoned in future events.
- **Embers** (What showed potential and needs nurturing?)
  - Promising ideas or elements that showed potential but need further development and nurturing to succeed in future events.

Throughout the observation process, and before moving to the next stage, the facilitator is grouping common observations.

- Second, attendees **upvote the observations** they agree with and/or want to discuss. Depending on the size of your group, you may want to limit the number of upvotes each person gets across the retro observations. Because some participants may need more time than others, you can ask those that are done upvoting to begin writing down "kudos" or shoutouts for team members that made great contributions along the way. These are read aloud in part 4.

- Third, **group facilitated discussion**. This is where a skilled facilitator really shines. They select topics to discuss - spending the most time on the constructive categories to address opportunities to do something different. The notetaker captures ideas as they are shared for the next event - to lead the discussion in part

Retro Tip: Make note of all comments offered so everyone feels heard and seen — but spend the most time discussing things you can on things you can change.

PART 3:

This is a fun follow-up. Ideas may have been shared during the discussion in part 2 as improvements for the next event. Building on this list, the facilitator opens the floor for a few minutes to surface other ideas for next steps. This list of "**next steps"** is shared generally in follow-up.

PART 4:

This last part is optional - but usually a good team-building finisher. It's the **kudos** section.

Event planning is hard work - and every event is filled with moments that are important to recognize and celebrate. The kudos selection invites participants to recognize each other.

While some folks may have written kudos in part 2 (filling the remaining time to upvote), everyone in the retro spends a few minutes writing at least one kudogram. The facilitator selects one person to read the kudos aloud and folks can celebrate along the way.

The best kudos are those that come top of mind when you reflect on all of the effort needed to execute the event. The fun thing about kudos is that once you start - it's often hard to stop! If you need inspiration. here's an illustrative set of kudos participants might share.

Kudos to the communications team for being so planful with event communications. It was helpful to know the complete set of emails that our attendees would receive so we could figure out where and when to share any extra information.

Kudos to the executive leadership team for making solicitation phone calls. Without you, we would not have had as much success with corporate sponsorships!

Kudos to the volunteer captain for leading the team of volunteers.leading up to and on the day of the event. It was so helpful knowing there was one point person to whom folks could turn with questions at the event.

Kudos to the marketing team. That impact video was amazing, and it really gave our guests a great feeling about being connected to our mission.

Retro Prep

To make the most out of your retro, we recommend the following preparations:

Create your retro team — Assign someone on your team to be:

- **Facilitator**: choose the person best at facilitation — not necessarily the leader of the event planning
- **Note-taker**: choose someone who you do not expect to actively participate in the conversation so they can focus on note-taking. If you can remember to record the conversation, that may be helpful as well.
- **Timekeeper**: if you don't have a tool for this (zoom timer, alarm, etc.) choose someone who is not afraid to share when time is up

Pre-define a goal for the retro — Align with your team and your organization's leadership about the purpose of the retro: to capture successes, learnings, and observations about the fundraising event to prep for the next event. Alignment here will create initial buy-in with your leadership to come with an open mind and act on feedback.

Prep any reports — Your retro should cover event fundraising, attendance, budget, and more. Be sure you're prepared for the retro with whatever reports you might need to share with the group.

Prep your tools — A retro is different from a round-robin conversation (where everyone waits their turn to contribute). It's easiest to choose a tool that will let folks participate at the same time.

- If you're hosting your retro in-person, consider large flip-chart pieces of paper, post it notes and pens, and even colorful dot stickers (for upvoting).
- If you're hosting your retro virtually, consider using an online retro tool — like a jam board or virtual whiteboard. If your team is tech savvy, you might consider repurposing an engineering retro board; our tech-loving team uses Notion for our retros.

Setup the conversation — The best participants are those that come to the meeting ready to participate.

- **Email in advance.** At least 48 hours in advance of your retro, share an agenda for the retro - complete with questions to consider so participants can get in the headspace for the conversation. Send a reminder 24 hours in advance.
- **Setup in real-time.** At the beginning of the conversation, remind participants of the purpose of the retro, outline ground rules for the conversation, and outline how the activity will go.

Prepare for Timed Breaks — If your conversation is one hour, you likely do not need a break, but if you're planning for a longer conversation, it will be important to add time for a bio break for participants. One of the great things about breaks is the free flowing conversation that happens, inspired by the retro conversation. If your notetaker can be present for these breaks, that helps capture any nuggets for your team.

Prepare for Retro Follow-up — What will you commit to doing after the retro? Share notes from the meeting? Share a meeting summary? Make an idea list for the next event? Send a simple thank you to participants? Something else? Envision what your follow-ups will look like and who will do them to reduce the reporting burden.

Retro in Action

We've shared the purpose of the event retro, a quick overview of the retro format, and tips for prepping for retro. Let's put this all together in an illustrative example.

Context: I am the Development Director for a Chicago-based nonprofit organization. We hosted our annual gala in the beginning of June, and I am getting ready for my event retro. My event was supported by the Development Department, Event Host Committee (some board members, some not), Program Staff (serving as volunteers), Marketing Team (prepped all collateral, wrote speeches, and supported the run of show), Accounting Team (reconciled donations and tickets and prepped reports), and the Executive Leadership team (made sponsorship asks, made speeches and more). I am not a strong facilitator, but I know that debriefing our event is important, so I'm choosing to host an event retro - and calling on my team for help. Because my event team is fairly large, I'm deciding to host a 90-min retro.

Retro Prep

About a month before my event, I coordinate with the team to find a time that works for all to retro the event (ideally one week after the event itself). Once I have a date, I book the room, secure supplies, and begin retro prep.

Create my Retro Team

I assign folks on the team to be:

- Facilitator - my colleague on the programming team
- Note-taker - my Development Associate
- Timekeeper - me
- Report Builders - As the retro is scheduled, I ask my team for help in preparing event-related reports - e.g., Accounting for help with a fundraising report and budget analysis, Communications for help with a report ort on media/press coverage. These reports should be emailed in advance of the retro (see retro prep email).

Pre-define a goal for the retro

I find time to chat with my organization's leadership about the purpose of the retro: to capture successes, learnings, and observations about the fundraising event to prepare for the next event.

Prep the retro setup email

I draft a note to attendees letting them know about the purpose of the retro, the retro format, and the categories for observations. Here's a version of the prep email I'll send 48 hours in advance. I'll resend this 24 hours in advance and the morning of the retro.

Hi all -

It's just about time for us to retro our event — where we get together to debrief what went well about the event and discuss ideas and learnings for the future. We have a lot to discuss, and to get you in the right headspace for our conversation, I'm sharing our conversation agenda.

- **Introduction** (10 minutes) — As part of the agenda, I'll ask for clarifying questions on the attached reports. Please do have a look before the meeting. We will not have time to review in detail during the retro.
- **Retro** (55 minutes) — Please come prepared with observations to share across four categories:
    - Mountains (What were the high points and successes?)
        - Major achievements, high points, and successes that stood out during the event.
    - Valleys (What were the low points or challenges?)
        - Difficulties, setbacks, or low points that negatively impacted the event.
    - Rivers (What flowed smoothly and went as planned?)
        - Processes, activities, or aspects of the event that went smoothly and according to plan.
    - Bridges (What helped us connect and overcome challenges?)
        - Solutions, strategies, and resources that helped overcome challenges and connect different aspects of the event effectively.
- **Break** (5 minutes)
- **Next Steps & Kudos** (20 minutes)

Questions or comments? Reach out to me in advance. See you soon!

Best,
NAME

Prep tools/the room

On the day of the retro, I tape 6 large flip-chart pieces of paper with large labels on them (Mountains, Valleys, Rivers, Bridges, Next Steps, and Kudos) to the room walls and divvy up post it notes, pens, and colorful dot stickers (for upvoting).

Retro Annotated Agenda

Introduction (10 minutes): I spend the first 10 minutes of the retro to remind folks

- what we're setting out to accomplish today,
- the key roles in the meeting - i.e., facilitator (my teammate on the Programming team), notetaker (my Development Associate), timekeeper (me), and all active participants (everyone else). And
- ground rules for conversation - to set the tone for a respectful, productive discussion.

I ask for any clarification questions, then, I turn it over to my colleague to facilitate. They will note that it will be important to refer to the initial event reporting for a recap of how our event performed against our event goals.

Retro Convo (55 minutes): My colleague explains that there are four categories of observations - Mountains, Valleys, Rivers, and Bridges - and that observations from the group should fit into these categories. They encourage attendees to comment on observations from their personal experience - for example, committee members might comment on fundraising, connections, the event planning process, etc. while the accounting team might comment on the collection on and reporting of funds, All are welcome to comment on the overall look and feel of the event.

More specifically…

- They explain that the group has **15 minutes to walk around, write a short description** (on a post-it note) **for each observation,** and place it in the appropriate category.
  - *As the group is writing, the facilitator is grouping similar post it notes within categories, making it simpler for the team to upvote.*
- When I (timekeeper) signal that the 15 minutes for writing are complete, the facilitator asks the group to read the post-its and upvote - up to 4 cards - for discussion. The group has **10 minutes to upvote observations**. If anyone is done upvoting before the time is up, they can begin writing "kudograms" for the room.

- When I (timekeeper) signal that the 10 minutes for upvoting are complete, the facilitator pulls the top voted cards from each category for a **30-minute discussion**.
    - The group discusses Mountains and Rivers at the same time for up to 8-10 minutes.
    - The group then discusses Valleys for 15 minutes.
    - Lastly, the group discusses Bridges for 8-10 minutes.
    - *As ideas for future events are shared, our notetaker is adding them to the "next steps" part of the meeting.*

Optional Quick Break (5 minutes): If the conversation is running on time, the facilitator can opt to give a 5-minute break. Or they can choose to extend the retro conversation for another 5 minutes.

Next Steps (10 minutes): The notetaker will share some next steps ideas stemming from the conversation, ask for new ideas to be sent over email, and make a commitment to sharing these out (along with notes) over email after the conversation.

Kudos (10 minutes): Some attendees may have already written kudos - but others may not have. At this point, to close out the meeting, the facilitator will ask attendees to give kudograms — or shout outs — to team members who did great work in the event planning, hosting, and retro process. Once folks are done writing, the facilitator will ask for volunteer(s) to read these off to the group — so all can celebrate.

Retro Follow-Up

Following the retro, I support the notetaker to capture all observations shared during the conversation and help prioritize them for key takeaways. I then...

- Draft a thank you note for attendees with next steps.

> Hi all -
>
> Many thanks for attending our event retro yesterday! It was a great conversation, and we appreciate your openness and specific feedback. As a next step, we're planning to clean up retro notes and create an "idea list" for the next event. Stay tuned!
>
> If you've had another observation since yesterday, please don't hesitate to reach back out to us. We're happy to add it to our notes!
>
> Best,
>
> NAME

- Commit to and get started on next steps.
- Check-in with the organization and event leadership teams about the retro and next steps.

Using the Retro to Start Planning Your Next Event

You've had your event. You've hosted your event retro. Now what? While it's fresh in your mind, draft a set of concrete goals for your next event, a tangible/simple way to measure them, and the team that will help you reach these goals. goals, consider.

STEP 1		STEP 2
Define Goals	**Measure Goals**	**Activate a team to Reach Goals**
Fundraiser?	measure $ raised and their makeup (new/retained)	invite your active major donors with connections
Board Member Value & Connection?	# of sponsorships from board members, # of stewardship conversations, etc.	prioritize support from folks board members trust/respect
Corporate Sponsorship?	# of corporate sponsorships and their makeup (new/retained)	ask corporate leaders who are connected
Brand Awareness, Impact & Transparency?	Media coverage, impact video sentiment, etc.	maybe someone with media/storytelling connections
Networking Event?	# of meaningful connections made over the course of the event	recruit networking experts