

HOW-TO BOOKLET

THE 4 KEYS to

SUCCESSFUL SPECIAL EVENTS FUNDRAISING



STEP

1



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Let's have a special event!

Your next special event:

Well-conceived, well-planned, and successful!



Why have a special event?

A volunteer brings it up: "Let's have a special event!"

Before you start thinking about decorations (or run for cover), think about all the long-term benefits you'll enjoy if you take your time, do the legwork and plan the absolute best event possible within your capabilities. Successful special events give you the opportunity to RAISE FUNDS and also to:

- Bring people together socially for your cause
- Galvanize your volunteers—and attract new ones
- Increase public awareness
- Expand your network of corporate contacts
- Solicit endorsements
- Put your staff front and center
- Get some media coverage

The effort can be more than worth it

Sure, pulling together a special event is labor intensive. You understand this first-hand if you've done it before. But if your event is well-conceived and well-planned, you can have a real winner on your hands -- one that you can repeat and grow, and reap benefits from, for years to come.

"How-to" Booklet and "Countdown Cards"

This how-to booklet gives you an overview of what it takes to put together a successful fundraising special event. And the accompanying "Countdown Cards" provide a timeline to help you plan a fundraising auction. You can easily apply these timeline elements to practically any special event you choose.



A rainbow of options

The opportunities for creative, targeted events are practically endless. Here are just a few examples to get you thinking.

Note: By combining events, you can come up with a fundraiser that's truly unique to your organization—and a lot of fun!

Galas and parties:

- Dinner dance
- Dinner with a well-known speaker
- Dinner series hosted by supporters in their homes
- Roast
- Street carnival and block party
- Costume party and dinner
- Father/daughter or mother/son dance
- Movie premier

Sporting Event:

- Tennis or golf tournament (with or without a celebrity)
- 5K or 10K Run
- Walkathon
- Bike-a-thon

Sale or service:

- Auction
- Rummage sale with concessions
- Bake sale
- Car wash
- Dog wash
- Book fair

Tasting or Celebration:

- Recipe cook-off
- "Taste-of" local restaurants
- Wine tasting
- Family barbecue
- Independence Day picnic
- Thanksgiving feast

Organization related:

- Campaign kick-off
- Victory Celebration
- Dedication
- Awards program

Arts and Entertainment:

- Performance
- Concert
- Monte Carlo night
- Art exhibition
- Fashion show
- Bingo night
- Comedy night

Educational:

- Lecture
- Conference
- Workshop



Understanding the Four Keys to Success

Key #1: The RIGHT people

Do you have who it takes to pull off a special event? First, make sure your pool of potential participants is big enough. You need buy-in, ideas and elbow grease from a lot of people: volunteer leaders, committee members, staff, board members and sponsors.

Second, make sure the RIGHT people are in that pool. Leadership roles require volunteers who are passionate, enthusiastic, energetic and persuasive. And who have a reputation for getting things done.

Key #2: The RIGHT event

Let the ideas on the preceding page inspire you. And let your volunteers' enthusiasm about a particular event guide you, too!

Be creative, yet astute: this decision is critical to your success. Make sure it matches up with your mission, target audience, capabilities and other criteria, and will offer your guests and volunteers an engaging and rewarding experience that's worth everyone's time and effort.



Key #3: Run it like a business

Even though it may feel like a party to your attendees, a successful special event is really more like a business. So treat it like one.

This means keeping a vigilant eye on objectives, timelines, databases and spreadsheets, marketing activities, legalities, ticket sales, donations, potential pitfalls and all your human resources. And, of course, your bottom-line.

Key #4: Recognize, reward and review

Your event is over, your attendees have gone home and now you can exhale, right? Not quite! Graciously and appropriately thanking everyone involved comes next. In fact, you should be thanking from the minute the first volunteer says “yes.”

It is also the time to evaluate your results—so your future events can be even more successful than this one. Look closely at what worked and what could be improved. Ask for participants’ feedback. Be constructive, thorough, and, most of all, honest.





Key #1: Enlist the RIGHT People

The team-building process

Typically the idea to have a “special event” starts the process in motion. The initiators (volunteers and staff) meet informally with the appropriate board or advisory committee members to get their input and conceptual buy-in. Then, once initial research shows the event is indeed feasible, the initiators meet again to talk about leadership roles and other important details.

With a broad yet structured overview in place, the special event idea is now ready for approval—and you’re ready to start building your special event leadership team.

Your Event Chairperson

The Chairperson is your event’s most important volunteer—and its public “face.” This person should believe in your mission and have the experience or skill set to oversee the entire project.

As you and your volunteer initiators build your special events team, look for an Event Chairperson who:

- Has successfully led or had a leadership role in similar events.
- Can manage, motivate and delegate to a diverse group of individuals.
- Has connections in the community to draw in sponsors, donors and media attention, and drive table and ticket sales, too.
- Is full of energy and ideas.
- Has excellent communication skills.
- Is a patient and accessible team-builder.

Get people excited from the get-go!

Present your special event as a terrific opportunity for all the reasons listed on page 1. You and your volunteer leaders should explain how much your organization will benefit from the event, and how each and every person involved will feel great for having been a part of it. It will be fun—and it will be worth it!

Then rank your list of candidates. In a perfect world, your first choice would agree to be your Event Chair and the next two would agree to be the Vice-Chairs. Note: Have more than three people on your list!

Your Vice-Chairpersons

Your Vice-Chairs help your Chair plan and manage all aspects of your event, and should therefore have many of the same qualities as your Chair—in fact, they may be nominated for the Chair position next year. Another approach is to let your Event Chair choose his or her own Vice-Chairs.

Your Honorary Chairs or Host Committees

Can you enlist a well-known, respected person who cares about your mission to lend his or her name (and hopefully an evening) to your event? Some organizations ask several people to participate in a “Host Committee” to create an even bigger draw and add more credibility.

Your Committee Chairs

These volunteers manage specific categories of your event, such as sponsorships, entertainment or ticket sales. They need to be enthusiastic, reliable and well-organized. Typically, Vice-Chairs select their own Committee Chairs.

Ask in person

Your candidate deserves a face-to-face presentation. Bring along your special event case statement, preliminary budget, vice-chair candidate list, background and other information about your organization. If the candidate says “no,” have alternative roles on hand that might get a “yes.”

Your Committee Volunteers

These are the “worker bees” who carry out committee tasks—you’ll get no honey without them. Tell them what’s expected and when, who will help them, and train or coach them so that they feel comfortable and confident in their duties. Enlist more volunteers than you think you’ll need—as much as 40% more. Personal emergencies happen. So do no-shows.

Your Staff

Your staff’s role is to support your volunteers and to give them the tools and the person-power they need. One thing your staff shouldn’t be expected to do: take on responsibilities assigned to volunteers.

Skill Sets: Filling in the Blanks

It’s important to take advantage of each volunteer’s natural abilities, and make sure they get help where skills are lacking.

Key #2: Choose the RIGHT Event



How to find the best “match” for your organization

Match your event to your mission

Choose an event that has a logical tie-in to your purpose. If your organization works with disadvantaged children, for example, a family-oriented event might be ideal. On the other hand, if you're raising funds for a substance abuse program, you probably want to avoid a wine tasting event.

Match your event to your goals

By having a clear idea about your goals, including the amount of money you want to raise, you'll quickly weed out choices that won't work so you can focus on those that might. If you want to raise a lot of money, for example, you need to charge a lot for your event, sell a lot at your event, attract a lot of donated goods or services or count on a lot of people showing up.

Match your event to your target audience

Will you invite your current constituents or a segment of the general public? What would these people like to do? And how much would they be willing to spend to do it?

Match your event to your capabilities

Your event should be congruent with your organization's budget and volunteer community, too. Not too big, not too small. But a manageable, doable event that will bring people closer together and strengthen their commitments. And if you and your volunteers adopt the mindset of exceeding your goals—while remaining optimistically realistic—you'll maintain the momentum you need for success.

Make your event pay off in the long-term***Make it educational: Information Sharing***

This is a terrific opportunity to inform people about the good you do every day. Make sure the event you choose can include an "interface area" for displaying your informational materials, such as brochures, videos, photos and other displays. And can provide an opportunity for board members, staff and volunteers to interact with attendees and answer questions.

Make it repeatable!

Invent an event with “annual” in mind. One that you can improve and grow. Without reinventing the wheel.

Then after giving it three years to mature, ask yourself the all-important question: Is it worth it? Your attendance, bottom line, staff and volunteer enthusiasm and overall benefits to your organization will give you your answer.

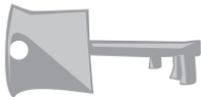
Make it comfortable: Event Location

Where you decide to have your event can have a huge impact on its success. Focus on your attendees’ experience. Is it appropriate for the type of event? Is it convenient? Is there enough parking and space to mingle—but not so much space that it appears poorly attended? These details make a lasting impression.

Yet you may not have to look further than your own front door. Inviting the public into your facility—and providing a first-hand look at your organization—may be just the ticket.

Make it memorable: The “Wow” Quotient

Your event needs to make people sit up and take notice when they’re approached for sponsorships and donations. And when the invitation arrives, too. Mimicking what others are doing diminishes the “wow” quotient. But adapting good ideas to your organization’s unique characteristics can be a great place to start. So go ahead... be creative. Be inventive. Be bold. And chances are you’ll be rewarded in the long-term.



Key #3: Run your event like a business

Build a foundation for success

Select the best date

Look at your fundraising cycle and consider the type of event you've chosen. And think about when your volunteers and attendees might be most available—and generous—with their time and money.

Then check past and upcoming community event calendars to make sure that your best date isn't someone else's as well. You especially want to avoid conflicts with long-established fundraising events or events held by organizations with similar constituencies.

Give yourself enough time

In fact, give yourself more time than you think you need—more than a year, if you can, since potential sponsors often plan their giving a year in advance. If you're planning a small- to medium-size event and you don't intend to pursue major sponsors, you can probably do it in six to nine months.

Set expectations in advance

How will you know if your event has been successful? Set goals during the planning stage—how much money you want to raise, how many sponsors and attendees you want, what type of results you want, how many new “friends” you want to make. After your event, evaluate your success (see page xx).

Cover yourself

Your state and municipality have laws and regulations that govern what you can and cannot do. Check into any license and permits you may need, including regulations for raffles and one-day liquor licenses, and how much they cost.

Keep track of absolutely everything

Create and maintain accurate databases and spreadsheets to keep your event on track. You can buy computer programs designed especially for special event management, or you can use what you already have. Whichever you choose, set it up early.

Plan your timeline

You'll need a master timeline that includes when the main tasks need to be completed and who's responsible for them.

Use the accompanying “Countdown Cards” to get you started.

Some examples of what to track:

Your budget:	revenue and expenses
Your invitation list:	mailing list, VIPs and RSPVs
Your sponsors and in-kind donors:	donations and types of acknowledgments
Your volunteers:	names and duties performed
Your communications:	letters, memos and thank-yous

Not only will careful tracking help you manage this event, it creates a template for the next one, too.

Develop a workable budget... and stick to it!

Think of all the ways you can raise money related to your event. And all the ways you'll spend it, too.

Then create a spreadsheet for tracking your "revenue" and "expenses," while keeping this caveat in mind: spend no more than 50% of your estimated gross revenue from this event.

The “revenue” side of your spreadsheet

Underwriters and Sponsors

Businesses (or individuals) that want exposure to your unique target audience are your potential underwriters and sponsors. In exchange for cash donations, you offer them visibility: in your promotional materials, your program, on your signage and over the public address system at your event (where they also get preferred seating!). The bigger the donation, the more prominent the recognition.

Offering sponsorship levels—such as silver, gold and platinum—can be quite motivating, for sponsors and the volunteers doing the asking. As can asking for sponsorship of one particular aspect of your event, such as catering or entertainment.

In-Kind Donations

Before you write a single check, try first to find an in-kind donation. In-kind donations are items or services that businesses or individuals offer you for free, or at a greatly reduced cost (often their cost). From napkins to entertainment to printing, these contributions can really add up. Be sure to recognize your in-kind donors in a similar way as your sponsors.

Tax-deductibility

Only the portion of the ticket price that is above the fair market value for what's being provided is tax-deductible. Sometimes the same goes for purchased items. Check with your accountant about specifics relating to your particular event.

Ticket Sales

Will you sell tickets to your event? How much will your target audience be willing to pay? How many do you have to sell to break even? To make your 50% profit?

It's a challenge to estimate the number of tickets you'll sell (and how many tables you'll need) if you're holding an event for the first time. But if you expect each of your Chairs and committee volunteers to sell a pre-determined number of tickets in advance (and buy their own, too), this task becomes much easier. Shoot for pre-selling 80% of your ticket sales goal before the invitations go out.

Revenue-building Extras

Will you sell ad space in your program book? Have a raffle? Sell grab bags, t-shirt, posters? These and other fun ideas all generate extra money. And don't forget: include a "no-show" option on your invitation so people can send in a donation without attending your event.

The “expense” side of your spreadsheet

Line Items

If you've held special events before, you already have an idea of how to estimate the cost of your event. If you haven't, consider which of these expense line items you'll need (among others), and call around to find out what the going rates are in your community:

- Location and equipment rental fees: facility, tent, tables and chairs, silverware, linens, decorations, plants and flowers, aisle stands, lighting and audio-visual equipment, set-up and clean-up fees
- “Talent” fees: special events consultant, speaker, performer or entertainment, graphic designer
- Printing and mailing costs: Letterhead, save-the-date cards, invitations, RSVP cards, tickets, programs, catalogs, posters, signs and postage
- Logistics and legal fees: transportation, deliveries, insurance riders and permits
- Event-day costs: catering, alcoholic and nonalcoholic beverages, security, valet
- Recognition costs: gifts and awards, thank-you luncheon or event, discounted tickets

How much is too much?

Is it worth it to rent a fancy hall? Use china instead of paper plates? Hire a nationally known speaker? Maybe so. But maybe not. Consider if the expense will generate twice as much as it costs in revenue.

Promote Your Event Like Crazy

Create a marketing plan

How will you get the word out about your event? Will you ask local publications for free ad space? Ask broadcasters to run Public Service Announcements (PSAs)? Ask the media to attend? If you're sending invitations, how will they best represent your event and get people excited about it, too?

From sponsor letters to public relations to printing event materials, how (and when) you spread the word can have a profound impact on your success. Write a comprehensive plan as soon as possible, including all the materials your volunteers need to make the event a success.

"Brand" your event

Here's where it really pays off to enlist the help of a professional (pro-bono, hopefully). Designing an attractive logo that represents your event and you're your mission—and also includes a catchy name—is not as easy as it sounds.

Ideally, your “brand” should be strong enough to last a long time. And come to elicit a positive feeling about your event. A “theme,” on the other hand, can change from year to year.

Create your promotional materials

And put your “brand” on everything related your event. You want to create as much recognition—and buzz—as possible. Here are some examples of what you may need to create:

- Letterhead: for committee chair recruitment, auction-item solicitations, volunteer confirmation and thank-you letters
- Fact sheets: for sponsor kits, media kits, news releases and PSA proposals
- Advertising and promotion: print ads, flyers, banners and newsletter features
- Mailings: “save-the-date” postcards, invitations, RSVP cards and return envelopes
- Event materials: tickets, programs, catalogs and signage
- Electronic communications: website home page link, event webpage and e-blasts

Be clear about your goals and mission

Make sure your marketing materials include how the money you raise will be spent and all the good it will do. Also, be careful not to appear as though you're wasting money on promotion—your materials should reflect your event and target audience.

Get your attendees and volunteers to sing your praises... and strengthen their commitment

Dot those i's

A well-orchestrated special event program that's interesting and seamless the whole way through gets people talking—in a good way. Plan every detail you can think of in advance. Imagine you're an attendee. Imagine you're a volunteer. What would make the experience most enjoyable for you?

Plan for pitfalls

Confirm all speakers, entertainment and deliveries early enough so you can make adjustments, if necessary. Do a dry run if you can. And make sure you've planned for more than enough service personnel and event-day volunteers (including a runner to fetch forgotten items) so everyone will be taken of and no one will be overwhelmed.

Have written back-up plans on hand for things that might go wrong once the event starts, and a kit with all phone numbers, lists, floor plans and other information you might need.

*Treat attendees like respected guests
in your home*

“Greeters” should welcome people as they arrive, direct them to areas of interest like bar, buffet and “interface area.” Chairs, staff and board members should reach out, introduce themselves and offer to answer any questions. The master of ceremony (or other speaker) should thank everyone for coming—more than once. And, last but not least, the event should end when it’s supposed to.



Key #4: Recognize, reward and review

Be Gracious and Generous with Your Appreciation

Thanking

Thank absolutely everyone involved with your event. And do it right away.

Thank them in person, by phone, with letters and in your newsletter, too. When done well, this is indeed a time-consuming task. So if your event is large enough, consider an “Acknowledgement Committee.” Thanking is crucial to the success of your event—and any future events you may have. Your reputation is on the line.

Confirming

Search through your spreadsheets and databases to make sure you haven't forgotten a single sponsor, donor or volunteer. And ask your leadership volunteers to do the same. If it's unclear whether someone has been thanked, go ahead and thank them again. It's better to thank someone twice than not at all.

Rewarding

Are awards appropriate? A luncheon or other post-event gathering? If so, build this into your budget from the start.

Your board can help determine what's an appropriate honor for high-level volunteers, in addition to a letter of thanks directly from the board.

Remember: you're not only wrapping up this year's event, you're laying the groundwork for next year, too!

Measuring your success

Be observant...what's the mood during your event?

And afterward?

Are your attendees smiling? Absorbed in the activities? How about your volunteers? Are people thanking you? Asking you if you'll do it again next year? Write down the comments you hear, positive and negative, and include them in your final report.

Consider asking a sampling of attendees for their written opinions, too.

A quick review

Take a look at all the subheads in this booklet. Every one is an evaluation point. And try this: list the ones that apply to your event in the form of an evaluation and ask everyone involved—staff, board members, chairs, committee volunteers—to rate them each on a scale of 1-5. Leave room for comments and suggestions, too.

Evaluating what went right... and what didn't

Refer back to the expectations you established when planning your event and see how you did. Did you raise the funds you wanted? Was your event well-organized, well-attended and well-regarded? Did you get the positive media coverage? New members or donors? A more educated community?

Shining a bright light on your results (warts and all) is critical to your success next time around.

Report back to your stakeholders

Compile your evaluations into a summary and distribute it—along with your final numbers—to all the key players. Then get started on next year's planning!

Have fun throughout!

What Next:

Visit Step 2 and the CD-ROM to learn how to develop a timeline using your special event countdown cards.

Visit Step 3 for your actual countdown cards. In addition to having a timeline model to adapt to any event you plan, we have provided information on holding an auction fundraising special event.

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