

eGuide



Special Event Planning Companion

A Pocket Guide To Managing Your Event
Budget and Fundraising Resources



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Creating a successful fundraising event is easier said than done.

We all have visions of a glorious social occasion, full of laughter and fun, with donations flooding through the gates.

However, the event itself isn't the most important factor in its potential success. **Your preparation is!**

In this guide you'll find tools to help you make the right planning decisions, keep your event on track and ensure you avoid any nasty surprises on the big day.

Special Event Planning Checklist

A successful event requires a combination of the right people with the right resources (time and money).

Do you have all the assets and support you need in place already, or are there holes that need to be plugged?

And do you know exactly what you want to get out of the event? Is it bringing in new donors, or creating publicity, or obtaining major gifts?

Special Event Planning Checklist

Let's start at the beginning. What are your organizational goals and what outcomes should you consider?

- What do you want to achieve from this project?
- Amount of money, NET. Percent of annual budget?
- Number of people involved. Where and how?
- Number of leadership roles possible?
- Number of new constituents to attend?
- Experience
 - Which skills will be learned?
 - What do we want to learn for the next event, and for this event next year?
- Who will take the leadership positions?
- How much publicity will it generate?
- What will be the impact of the event
 - Within the organization?
 - Outside the organization to the people you want to join?
 - Among perceived competitors?
- Can it be repeated - in six months, one year?
- Can you increase revenue next time?
- Which new sources of revenue will you see
 - New members?
 - Non-member individuals?
 - Businesses and corporations?
 - Foundations?
- Organizational advantages
 - Morale / fun?
 - New people, new area, new style event?

Special Event Planning Checklist

Do you have the right people in place or will you need to recruit?

- Chairmen (their time and talents)?
- Volunteers with experience in this kind of event?
- Volunteers able to work at the event?
- Volunteers who will otherwise attend or contribute?
- Possible allies and new members who will get involved?
- Staff?

How are you handling your time and bank balance?

- How much time does your organization want to spend fundraising?
Is there a way to shorten it?
- Are there any major conflicts in your organization's or your community's calendar?
- How much staff time do you want to allocate to this project?
- If this event is to be repeated annually, is this the best time of the year for it?
- What consideration should you make for bad weather?
E.g., an alternative snow/rain date, inside location or insurance?
- Cash available for the event - from petty cash or development department?
- Who will handle the money coming in? Who will control the money going out?
- Will you need a separate bank account? Do you need any special arrangements to handle lots of cash?
- What is our break-even point (income minus expenses)?

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Special Event Planning Checklist

Don't forget the essentials, when appropriate, on the big day.

- Notification of the police
- Proper insurance
- Cash boxes
- Cash in proper denominations for each cash box
- Receipts
- Literature on your organization
- Written notice of your next meeting or event(s)
- Membership cards
- Sale merchandise (buttons, cook books, research, etc.)
- Sign-up list (can be accomplished simply with door prizes)
- Name tags for your committee (or all attendees)
- Emergency phone numbers for police and fire
- Cash for emergencies
- First aid kit
- Pens / tape / aspirin
- Comfortable shoes
- Important phone numbers (band, host, speakers, etc.)
- Name of doctor or nurse who will be present
- Sense of humor, tact, patience, and imagination

Special Event Budget Planner

Use the tables below to determine the revenue required to cover your budget.

Ticket sales required to meet goal

Target Net Income (your \$\$\$ Goal)	+	Estimated Expenses (see next page)	=	Total Income (Revenues) Required	÷	Cost per ticket	=	Number of tickets to be sold

Income (include only those that apply)

Income Source	Qty.	Price	Total Income	1st Progress Report	2nd Progress Report	Final Results	% + or - Budget
Regular Tickets							
Patron Tickets							
Advertisements							
Raffle							
Auction							
In-kind Donations							
Sponsorship							
Other							



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Linda is part of a select group of professionals worldwide to hold the Advanced Certified Fund Raising Executive designation. In her twenty-plus years as a philanthropic consultant, Linda has managed capital campaigns, helped hundreds of nonprofit organizations achieve their development goals, and trained more than 27,000 development professionals in Canada, Mexico, Egypt, Bermuda, and most of the 50 United States. Linda is a Personal Fundraising Coach with Network for Good.