



Sage Nonprofit Solutions

E-Book: Event Fundraising Best Practices

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Introduction

Fundraising events—such as auctions, galas, walk-a-thons, and golf or other sporting tournaments—can be a wonderful way to build awareness and community support and raise significant funds for your organization. However, they have to be planned and managed carefully to ensure they are successful. Otherwise, you may end up losing a significant amount of staff time and money with very little return on your investment.

Remember that you are planning a fundraising event. You'll need to spend the majority of your time planning and preparing the aspects of your event that are tied to fundraising to ensure its success in raising money for your organization. Then you need to take care of the other details so people will have fun. This is no short order!

The purpose of this e-Book is to help guide you through the planning process for your next event and to provide you with a number of ideas and strategies to make your next event a raging success in both attention and dollars raised.

What Is "Event Fundraising" and Why Is It Important?

"Event fundraising" is the planning, managing, and execution of an event designed to raise money for a nonprofit organization. In addition to those mentioned above, nonprofits hold raffles, trivia nights, any other a-thon (biking, bowling, skating, you name it), bake sales, and contests to raise money and awareness. The purpose of the event is more important than the type of event being held.

It may seem inconsistent, but many people are willing to spend more for an item or an experience when a portion of what they spend will go to a charity, rather than donating those funds directly. There are many psychological theories about this phenomenon but what is important to know is this:

People are different. Your organization needs different kinds of appeals to encourage as many people to support it as possible.

Nonprofit organizations that create multiple avenues for connecting and communicating with individuals are more likely to have success raising funds to support their work. Consider event fundraising to be one of many tools available as you work to grow your organization's network of supporters.

Examples of Event Fundraising

There are many different types of fundraising events you can choose to support your organization, some of which are mentioned above. Below is a list of the most common fundraising events, along with a brief description for each. You can use this list as a starting point to brainstorm event ideas or to find components that can be added on to an existing event during the planning process.

Auction

Auctions can be a great way to raise additional funds. They are often added on to other events, such as galas, dinners, and sporting events. Auctions can also help make connections to the business community. Who do you think donates all those great items? Both current supporters and unaffiliated attendees enjoy auctions, as they are a place to find bargains. The lively atmospheres of auctions tend to be highly enjoyable.

Bake Sale

Your kid's school bake sale is about more than baking brownies. A bake sale is a very effective type of event fundraising. Who knew? Bake sales do best when targeted at a very specific goal (new microscopes for the science lab) rather than a broader one (improving science education).

Contest

Contests can be built around almost anything, making them easy to tailor to your organization's area of focus. Money can be raised through various types of fees, such as competition and entry fees, so their structure is quite flexible.

Gala

The granddaddy of all fundraising events is the gala. It is usually the first thing folks think of when they hear "fundraising event." A gala can include dinner, dancing, musical performances, and/or an auction. Galas can be a solid fundraising tool but can be very time consuming and expensive, so they may not always show a good return on investment.

Golf or Other Sporting Event

Love 'em or hate 'em, golf and other sporting events are some of the most common fundraising events. Much like the gala, these events can be expensive and difficult to organize. It is crucial to evaluate your return on investment with these events.

Raffle

Raffles, like auctions, help create connections with the local business community since raffle items are donated by these local businesses. Raffles require detailed advanced planning, as many decisions must be made in advance and clearly communicated (Do individuals have to be present to win? How long will items be held if they do not?).

Trivia Night

These events involve individuals or teams competing to answer trivia questions. The trivia can be general (like Trivial Pursuit) or specific to your organization's mission (information about food and wine for a food pantry). These events are often held in conjunction with other events, such as a gala or an auction.

Walk-a-Thon

Walking is only one of the many activities that has been crafted into "a-thon" fundraising events. Dancing, singing, cooking, dog washing—the sky is the limit. These have increased in popularity over the past decade, so schedule your event carefully so it doesn't conflict with other "a-thons" in your area.

Event Planning Timeline

A successful fundraising event is not something you whip up over a weekend and launch on Monday. There are many critical steps and planning stages that need to be addressed to ensure your event's success.

Depending on the size and complexity of the event, your timeline may stretch from two to ten months or more. Some organizations work on large events year-round since they begin planning for next year's event as soon as this year's event is complete—or even before.

To help you see how the pieces need to fit together, below is a sample timeline for a midsized event that is planned, held, and evaluated over the course of six months. This is a model rather than a template, so know that you can expand or contract this timeline as needed for your event and your organization's needs.

Sample Event Timeline

Month 1	Planning <ul style="list-style-type: none"><input type="checkbox"/> Select your event type<input type="checkbox"/> Determine your goals for the event<input type="checkbox"/> Review previous events for lessons learned<input type="checkbox"/> Set the event date<input type="checkbox"/> Set the midcampaign check-in
Month 2	Setup/Get Sponsors <ul style="list-style-type: none"><input type="checkbox"/> Create event microsite or event section on current website<input type="checkbox"/> Create online registration process<input type="checkbox"/> Create fundraising systems<input type="checkbox"/> Select and confirm vendors<input type="checkbox"/> Get sponsors
Months 3 and 4	Publicize and Market <ul style="list-style-type: none"><input type="checkbox"/> Create a marketing plan and calendar<input type="checkbox"/> Create marketing materials<input type="checkbox"/> Promote to past participants and supporters<input type="checkbox"/> Promote to new prospects<input type="checkbox"/> Conduct the midcampaign check-in<input type="checkbox"/> Continue to publicize and market
Month 5	Run the Event <ul style="list-style-type: none"><input type="checkbox"/> Prepare all needed items for event day<input type="checkbox"/> Set up location and registration areas<input type="checkbox"/> Conduct full run through before the event<input type="checkbox"/> Make any needed changes discovered in the run through<input type="checkbox"/> Run the event<input type="checkbox"/> Don't forget to smile and breathe!
Month 6	Follow-up/Evaluate <ul style="list-style-type: none"><input type="checkbox"/> Create and implement follow-up plan<input type="checkbox"/> Thank supporters and volunteers<input type="checkbox"/> Evaluate event planning, management, and execution<input type="checkbox"/> Evaluate event ROI<input type="checkbox"/> Decide if event will be held again<input type="checkbox"/> If it will be repeated, formally review and record what went well and what should be improved

* [Printable version of Timeline is included in Appendix](#)

How to Run a Successful Event

In order to ensure that you know exactly what needs to happen and when, the components of the Sample Event Timeline are discussed in more detail below.

Planning

"Fail to plan, plan to fail." It's a cliché for a reason. Your organization's plan is its roadmap for reaching goals, implementing strategies, meeting timelines, and executing successfully. It is useful for staff members as well as for board members, volunteers, and even consultants. Whether you are running a large-scale conference with a six-figure budget or an intimate reception, you must prepare a written plan.

If your organization is new to event fundraising, you may want to start with a few smaller events so you can gain experience before tackling a major event. The planning, management, and execution of successful fundraising events are acquired skills. Mistakes will be made, so consider limiting the size of your first events to control how many will see those mistakes. Working your way through the whole process a couple of times will also help you identify your organization's weaknesses and strengths. This knowledge will improve your planning for the next event. The goal is to make each event better than the last!

Select Your Event Type

There are many factors that go into choosing an event type—time of year, weather, supporter interest, organizational goals, timing of other local events, and more. Only you and your organization will be able to make this decision since it will be based on your unique situation.

Consider testing a few different types of events to see which one gets the best response and overall return on investment. You can also survey your supporters to ask what types of events they would be interested in attending. They may surprise you. In fact, they might even give you some new ideas!

This decision is a big one since it will help determine many other aspects of the event, including location, time, dress for staff and attendees, food and beverage choices, and ticket prices. It will also set the tone for the type of experience attendees will expect and the number and type of attendees it will draw. A BBQ contest with family-friendly activities will bring a different crowd than a formal cocktail party. As this decision is being made, think about how the event type fits in with your organization's mission and the prospective donors you are trying to reach to make sure there is a good match.

Signature Events

Signature events are those seen as unique to a specific organization. They often have a strong tie to the work of the organization with a "hook," which creates buzz. Making your event one of a kind and relevant to your organization will help to distinguish it from all the other generic galas and events. This is important, as organizations in the same region compete for the attention and donations of similar sponsors, donors, and attendees. Signature events help create a legacy as well as a bandwagon that people want to join, allowing organizations to educate more people about their cause, attract more attendees, and ultimately raise more money.

Review Previous Events and Set Goals

If you have held this type of event before, review its previous iterations. What lessons can you learn from the successes? What improvements can you make? What should be scrapped? This last one can include everything up to the event itself—don't get caught in the trap of "We've always done things this way." Be sure to learn from failures and make changes as needed.

Goals should be set for each event, whether this will be the first or twenty-first time your organization will host this type of event. Make sure you're hitting all the right notes by making your goals SMART (Specific, Measurable, Attainable, Realistic, and Timely.) Remember to set event goals for both quantitative areas, such as numbers of people attending and fundraising totals, but also for qualitative areas, such as increasing issue awareness and educating the community. While the latter can be a little harder to measure, their impact is often quite large and long-lasting.

Set the Date

Make sure you are setting your event up for success by providing sufficient time to accomplish all the necessary steps. Set the date for your event far enough in the future so you'll have time to properly plan, prepare, and most importantly market your event.

Get on your organization's and community's calendar early. As soon as the event date is confirmed, mention it in any communication you send to donors and supporters. If any letters or emails are automatically generated, make sure to update those with event information as well.

Send out save the date emails or notices several months in advance of your event so prospective attendees can plan to attend. People are increasingly busy; short notice on the date will mean many people will simply have other plans already.

Submit event notices to community calendars published by local newspapers, magazines, and television and radio stations. Include any deadlines for registration or entry as well as the event date and any confirmed details. Also submit information about your event to local Chambers of Commerce and Convention and Visitors Bureaus. People can't come if they don't know when it is!

Weekends are usually best for maximum participation, but think about whether that is true in your area. Try to avoid conflicts with holidays, community events, and other groups' events. This is easier said than done, but it is well worth the effort.

Midcampaign Check-In

Schedule a formal opportunity to check on the event plans and progress. Use this time to identify tasks that are behind or ahead of schedule as well as areas of success and those needing improvement. Be proactive. This review will allow you to address issues before they get too big to fix and make good work even better. Schedule the midpoint review now so it doesn't get lost in the day-to-day rush.

Items to assess include:

- Are ticket sales and fundraising goals on pace?
- If sponsors or item donations are needed, are confirmation of these also on pace?
- Have sufficient volunteers been recruited? Trained or scheduled for training?
- Have all vendors and event space(s) been confirmed? Are the needed contracts signed?
- Have all designs and printed materials been started? Have event notices been sent to all the applicable people and organizations?
- How well are other goals being met?

By forcing yourself to answer and review these questions at the midcampaign point, you still have time to address them and ensure the success of your event.



Setup

Microsite or Section on Your Current Site

Harness the power of the Internet by creating and publicizing a unique webpage for your fundraiser. Virtually every nonprofit has a website. However, if yours is busy or complicated, it may be difficult for donors to see why and how they should register and attend your event. Help people learn why your event is one they should attend by providing one-stop shopping for the event details.

To do this, set up a blog, website, or special section of your organization website with a URL that is easy to remember and specific to your event. Then put that URL on your flyers, direct mail, and other materials. You can even include it in listings on community calendars and print it on any T-shirts that you distribute early.

A well-designed site will appeal to potential donors and attendees, reinforcing that they want to be involved with your organization and its mission. State the need your organization addresses and your organization's goals clearly. Be transparent in your organization's stewardship of donations—directly ask for the funds you need and explain how they will be used. When possible, share stories about the impact your organization is currently making.

Your site and event page should both contain three essential items:

1. A concrete definition of your organization's mission and the need it addresses
2. A clear description of how the funds raised will be utilized to address that need
3. Prominently featured “Donate Now” and “Register” buttons

Create an Online Registration Process

Most people now expect to be able to register for events online. Luckily, there are many tools to help manage online registrations, ranging from simple to sophisticated, multifunctional options, including Sage Fundraising Online (www.SageFundraisingOnline.com).

Keys to a Solid Online Registration Platform

When deciding on the best tool for your organization, think about your organization's needs. Do you need an easy way to accept credit cards? Would it be helpful to gather additional information as part of the registration process? Would it be best if the registration information could integrate with an offline database? Your needs should drive this decision so here are a few factors to consider when making your selection:

Easy Event Registration—The last thing you want is for people excited about your event to lose their enthusiasm as they struggle with registering for it. Easy online registration is a must for successful fundraising events. If the registration process is cumbersome or faulty, there is a good chance people may become frustrated and not complete their registration or tell others how much of a pain it was.

Easy to Find—You can also help smooth the path for prospective attendees by making your online registration easy to find. Make it available on multiple pages of your organization's website (at least the home page and event specific page) as well as your organization's Facebook page, and anywhere else your supporters might find you online.

Streamlined—No one enjoys filling out forms, so make your registration process as streamlined as possible. Collect only the information you need and group relevant information together to make forms easier for people to complete. You may desire additional information for your database but think long-term and use an after-event email or survey to collect additional information. Folks will be much more likely to share after they have had a great time at your event!

Capture Data—Think of data as a unique currency. Maximize your return by capturing the registration data in a database. This will allow you to email participants in case the event logistics change, run reports to spot trends, and thank attendees after the event. Having registrants' email addresses will also allow you to add their information to your fundraising database, expanding that donor funnel.

Utilize Existing Social Networks—Your constituents and supporters are already talking about your organization online—on Facebook, through Twitter, and in other online communities. Leverage these conversations to help promote your event and your cause. Actively participate in these conversations and give your advocates easy ways to share your message. This expands your organization's reach while still providing you some control over the message.

In Sage Fundraising Online, forms can be shared by individuals on their personal blogs and websites, as well as easily posted on their Facebook and Twitter networks.

Peer-to-Peer Fundraising—Individuals are more likely to give and give greater amounts when they are asked to donate by their peers. Empower your event's participants to promote their involvement, recruit others, advocate for the cause, and raise funds in their own name. Let individuals set their own goals. They'll become more motivated to fundraise on your behalf as they watch their progress grow.

Communicate Progress—Keep your supporters up to date on the fundraising effort by using a real time status report of donations received thus far. If you're using peer-to-peer fundraising, also enable individuals to track their fundraising progress to provide immediate and ongoing feedback regarding their success.

Sage Fundraising Online (www.SageFundraisingOnline.com) can handle all of these aspects and more.

Create Fundraising Systems

A big question to answer in your planning is: How will you solicit and accept donations before, during, and after the event?

There are many methods for soliciting and accepting donations. The best one for your purposes will depend on the type and structure of the event as well as the technology tools you have on hand. Options can range from handing out donor cards and asking for checks during the event to sophisticated online systems that encourage peer-to-peer fundraising throughout the event cycle.

When thinking this decision through, evaluate whether any “add-on” fundraisers, such as auctions, contests, or raffles might be appropriate for your event. Additional activities can raise more funds, so you'll want the fundraising system you select to be able to cover these activities as well.

Select and Confirm Vendors

Each event has unique needs. A location may need to be secured, food may need to be catered, performers may need to be booked—the list can go on and on.

To make sure you are addressing each need, mentally walk through every aspect of your event to determine whether vendors are needed to complete the various parts successfully. Create a master list as you go. Once all the needed vendors are listed in one place, think about the order in which vendors need to be confirmed. Will the location dictate the food choices? Will the keynote speaker influence the items that will be sold? Think about the pieces both separately and together to determine all your needs.

Once you have established the necessary order for the needed vendors, start with the most crucial need and begin working your way down your list. Knowing exactly what is required is at least half the battle.

When securing vendors, you should consider asking each vendor to become a sponsor of your event. This possible win-win situation is discussed in more detail below.

Get Sponsors

The success of many fundraising events excites sponsors and leads them to be more involved. Sponsors can support your event with monetary donations, donations of items or services, publicity, discounts on services, or in-kind donations (such as printing, concessions, or event space). Don't forget the possibility of people in the sponsor organizations volunteering.

Start by creating a list of potential sponsors. This list can include past sponsors, businesses that have been involved with other events, businesses that your staff or board already have a relationship with, and businesses that are new to the community. Your vendors are another group of potential sponsors. Focus on businesses or organizations that make sense for your event and your cause.

Once you have brainstormed a list of potential sponsors, approach each organization with a win-win proposal that highlights how their support will help both your and their organization. Think about what their pain points might be and how sponsoring your event can help address them. For example, a new bakery might need to get its name out but not have a lot of money for marketing. In exchange for the donation of cakes to the event, your organization would publicize its name and contact information. Benefits to sponsors can include publicity, good will, community support, and even new potential customers for their business.

Oftentimes businesses sponsor charity events to make a contribution to the local community and to foster goodwill. Clearly showing businesses the positive publicity your organization will give will increase the value businesses perceive and improve the chances you'll receive a sponsorship from them. Prominently feature sponsors on event literature, websites, T-shirts, advertising, and signage. Mention their support in preevent media where possible. Recognize sponsors' contributions during the event, too. Having different levels of sponsorship available (with corresponding levels of benefits) can help involve more small- and mid-sized businesses.

Publicize and Market

Have you heard of the time-tested marketing theories “The Rule of Threes” or the “Seven Touches”? While they are structured differently, both state that individuals must hear about an item multiple times before they will remember it and be ready to take action. This means you’ll need to share information about your event many times and in multiple mediums.

This is why “Publicize and Market” takes up two of the six months on our Sample Event Timeline (See page 21). It is that important. If folks don’t know about your event, they won’t attend and you will not hit your fundraising goals.

Create Marketing Plan and Calendar

Within your timeline, create a mini-timeline for publicity and marketing. This should cover the types of marketing you want to use as well as the timing of those communications. Create a week-by-week plan of what, how, and when you will be communicating. This will help keep you on track and ensures that your efforts are properly spaced out leading up to the event.

Remember that different people respond to different types of communication. Some people prefer email while others prefer phone or text messages. Create your publicity and marketing plan accordingly. Utilize as many channels of communication as possible, including traditional direct mail, print media, email, social media, and radio or TV, to help get your message out.

Create Marketing Materials

Once you have a publicity and marketing plan and calendar in place, it’s time to write the publicity and marketing pieces. Again, include multiple communication channels, as some people will be more open to one type of communication. Ask someone unfamiliar with the event to review the pieces to make sure all the desired details are covered.

The goal of all of the marketing materials should be to drive traffic back to your website so that people can donate and register for the event.

Promote to Past Participants and Supporters

If you have contact information for previous supporters and participants, the first step in marketing should be to contact them. They are your most likely supporters and attendees since they were already convinced about the importance of your cause. Remember “The Rule of Three” and the “Seven Touches”? These individuals have already received multiple communications from your organization.

If your organization has held this event before, it is less expensive to persuade past attendees to come again than it is to persuade new folks to attend. Since you have past attendees’ contact information (you do, don’t you? This issue is discussed in more detail below), send them a save-the-date notice so they can add the event to their calendar.

Strongly consider administering special invitations or benefits for past attendees. They’ve supported your organization year after year, so show them your gratitude by treating them like the VIPs that they are.

Ask past participants to tell a friend about your event. According to the Millennial Donors Survey (<http://millennialdonors.com/>), 71.7% of Millennium donors (typically those born in the late 1980s to the 2000s) said they’d be willing to communicate with friends and family about ways to become involved with an organization they support. Give them easy ways to spread the word to their family and friends. You can do this through social media sharing icons on your website or by simply asking them to forward an email about the event. The key is to ask!

Promote to New Prospects

Unlike marketing to your past attendees, trying to find, communicate with, and convince new individuals to attend your event can be time consuming and expensive. The bulk of your marketing budget and time will probably be spent here.

Employ multiple touches and multiple channels of communication. Then lather, rinse, and repeat until you hit your goals.

Conduct the Midcampaign Check-In

Aren't you glad you scheduled a midcampaign check-in during the planning phase? Walk through all the plans and progress to date. Questions to ask during this process include:

- Are you on track for a successful event?
- What is the progress toward each of the goals?
- What is working well? What needs to be improved?
- Where is extra support needed?

Taking a moment to step back and review will help you chart the best path forward to a successful event.

More Marketing Ideas

Preevent Communication

Donors want to know that their contributions are making a difference. Keep those who register or donate prior to your event well informed about your program results, project status, and fundraising progress. This will enable them to see their contributions are already making an impact while strengthening their connection to your organization. It will also get them more excited for the event and might even encourage them to tell others about the event and increase your registrations.

Promote Your Cause, Then the Activity

People can go for a walk, ride a bike, go dancing, or play golf any time. What will motivate them to pay a registration fee and dedicate a portion of their time to your event? Your cause will.

Ensure that your cause is at center stage. Be very specific about how the money raised will be used and how it will make a difference. Promoting your cause before you highlight the event's activity is one of the best practices you should definitely follow.

Here are some questions you can ask to check this point:

- Do your event materials focus primarily on crowds of people participating in the event's activity?
- Would someone who had never heard of your organization before know what the funds raised will support?
- Does your print or website content contain general, clichéd phrases like "make a difference" and "those in need"?

If necessary, consult your marketing team or an agency to create compelling communications that move people to participate.

Remember those qualitative goals discussed earlier? This is one of the areas where they can come in handy. Would you rather add 500 new participants who make the minimum donation, collect their T-shirt, eat your food, and go home or 250 new participants who are inspired to communicate your mission with others, go beyond the minimum donation, and become connected to your organization? Make sure you know what you really want from your event and promote it accordingly.

Use Story Telling to Make Personal Connections

The level of need in the world can be overwhelming; studies show that human empathy tends to diminish as individuals are asked to help larger groups of people in need. Help supporters see that they can make a difference by making a clear connection between their donation and the need it will alleviate by sharing individual success stories. These will illustrate the impact of your organization's work clearly and compellingly.

Social Media

Many of your current supporters are undoubtedly utilizing social media, so think about the role Facebook, Twitter, and other forms of social media can play in your marketing efforts. As mentioned above, people are more likely to participate in and support an event when asked by family or friends. Make sure it is easy for your supporters to share information directly with their social networks by providing "share" buttons on your website and registration/donation forms.

Equip your participants, supporters, and donors with the tools to become donation engines themselves. Give them the means to share information about your event easily. Encourage supporters to continue the conversation, both with your organization and their networks.

Traditional Media

Successful nonprofits are skilled at leveraging resources. One resource that can be overlooked is the media in your area. Take advantage of their connections in your community by maximizing the free publicity they give to fundraising events. Submit public service announcements (PSAs) and calendar updates about your event to local television and radio stations and publications.

Consider contacting local print reporters from the community or lifestyle beats and local bloggers who cover community events to see if they will cover your event as a story. This will bring even more attention to the event and your cause, while providing reporters with a desired "good news" story. Have a contact from your organization available to the media for interviews or questions. Make sure the contact is well-prepared to discuss how your event is supporting your organization's mission and has some of those individual stories ready to highlight. Practice makes perfect so try a few dry runs before the reporters call.

The Event Itself

Here's where all the hard work you have put into planning and proactively managing the event pays off for your cause.

Prepare All Items for Event Day

Think through each activity that will occur at the event and create a list of the materials needed for each. This could include name badges for volunteers, decorations for the site, registration forms, donor cards, or marketing materials. Don't rely on your memory. Make it easy for yourself and others supporting the event by having copies of a clear list of the needed items. Then check your list twice against the items that have been prepared and packed to make sure that everything is there.

Setup Location and Registration Area

Visualize how participants will arrive, register, and flow through your event. How can you make folks feel welcome from the start? Does the flow make sense? Do you have everything you need for the location?

At the registration area, focus on warmly welcoming your guests and processing their registration quickly so they can move into the event ASAP. Using an online registration system, such as Sage Fundraising Online, can greatly speed up the registration process. Online registrants will have already paid, indicated their food preferences, and taken care of other details, so they would just need to show their confirmation email as proof of registration.

A helpful idea is to have a separate line for "Online Registrants." This will get those registrants into your event quickly while allowing others see the benefits of online registration, making them more likely to register online for your next event. You could even have a few laptops connected to the Internet at the registration table and allow folks to register online right there, saving your staff time.

Conduct a Full Run-Through Before the Event

Similar to a wedding rehearsal, a full event run-through can reveal snags and help everyone feel more comfortable with their duties. Have a few of your staff or volunteers pretend to be attendees and walk through the entire process, from arrival to departure. At every step, consider how attendees will feel and how you can improve their experience.

Run the Event

The big day is finally here! Make sure you and your team are in top form by preparing the way parents prepare their children for a big test: Get a good night's sleep the night or two before, eat a healthy breakfast, verify that you have the right materials on hand for the event (extra registration forms, blank nametags, a list of important phone numbers, a freshly sharpened #2 pencil—whatever you need), and have a positive attitude.

The majority of work needed to produce a successful event has already been done, so now you can concentrate on making everything flow smoothly.

Ask for Donations at the Event

This point is so important that it deserves its own section. A great deal of effort has gone into getting everyone to your event. Now it is time to take full advantage of this opportunity by explaining how important your cause is and asking them to support your organization's efforts to address this need.

This should not be an off-the-cuff request. Plan the ask carefully. One idea is to have a local celebrity or major donor make a short speech about why your cause is important, why they give to your organization, and then ask the other attendees to please join them in supporting your organization. Another option is to have an individual who has been helped by your organization discuss how that assistance has changed his or her life and then ask the attendees to help others in the same situation. Or you could show a video or slideshow featuring work done by your organization and showing exactly where donations will be utilized. Elements of these ideas can also be easily combined.

The request for donations can occur in many different ways but three elements are essential:

1. A concise statement of your organization's mission—what need is being addressed
2. An unmistakable link between your organization's mission and the solicited funds—how will the money be used to address that need
3. A clearly stated request for donations—how they can help

This is not the time for long-winded stories or beating around the bush. The request needs to be straightforward and to the point. Thank everyone for their support and then direct them back to the event's activities. Tell them to enjoy themselves!

Capturing Attendee Contact Information: One of the most magical aspects of a special event is the opportunity provided for introducing your organization to individuals who were previously unaware of its existence or its work. Don't let the magic die by losing touch with the people you worked so hard to get there! Capture the contact information of your guests so you can stay connected. It may sound obvious, but many organizations falter on the execution of this key element.

Registration forms and ticket presales both allow for the capture of attendee information. Some situations, however, may make this effort more difficult. For example, a company could sponsor a table of eight at your gala, so you have the contact information for the company but not for the eight people filling those seats. Think through the best ways to collect and store contact information. Spending time on this crucial point will allow for postevent thank-you notes, cards, future invitations, and opportunities to engage those guests in other organizational activities.

Follow-Up/Engagement

The period immediately following a successful event is one of the best times to engage supporters and donors. They'll be much more likely to respond to your requests, so make some!

Research has shown that asking people for small favors increases their connection to you. Ask donors and attendees for little things like completing a brief survey about the event, forwarding information to a friend, or liking your organization on Facebook. Stronger connections lead to increased donor engagement over the long term, and the stronger connection will increase our likelihood of getting future donations.

Postevent announcements and acknowledgements can even trigger last-minute donations while also creating excitement for next year's event.

Create a Follow-Up Plan

You need to put the same care and attention into your follow-up plan that you did into your other plans. Many organizations drop the ball here, so it's a great place for you and your organization to stand out from the crowd.

Think of your follow-up plan as a long-term ongoing dialogue with your supporters and sponsors. (Please don't forget to include your sponsors—they are likely some of your biggest donors.) This does not mean sending a generic "thanks for attending" or "thanks for sponsoring," and no more communication until next year's event. Be in touch at multiple points throughout the year and through multiple channels. Do send sincere and personalized thanks for their support and attendance at the event, but also communicate your organization's progress towards the goals discussed at the event, success stories, and other events they might like to attend.

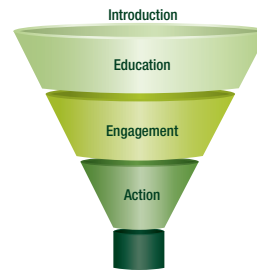
Break out that calendar again and plan your follow-up communications. Some possibilities to include:

- Thank donors and sponsors immediately following the event
- Ask donors and sponsors to complete a brief survey about the event
- Thank them again throughout the year (possible times include end of the year, Valentine's Day, or the organization's founding day)
- Update them on progress and successes
- Add them to your other fundraising campaigns

Donor Funnel

Managing the donor funnel is the process of cultivating prospects into donors and encouraging them to give increasingly larger gifts and to give more often.

Events are a great way to increase your donor funnel if you are prepared. Not only will an event draw many new individuals (Introduction), you'll also have an opportunity to get to know your attendees better and engage them in deeper, more meaningful ways (Education and Engagement). Through this process they are much more likely to donate and become a frequent donor in the future (Action).



Having a donor cultivation plan in place for your event is key. You can learn more about your attendees from the events they choose to participate in (and those they pass on), those they donate to (and those they pass on), and their registration forms. Then put that information to use by tailoring your follow-ups with them. For example, if an individual supports a green building program but not the traditional building program, make sure he is fully informed about all of your organization's green efforts.

Thank Donors Multiple Times Throughout the Year

Everyone who helped put on your event should receive a personalized thank-you note soon after the event. Send thank-you notes to the sponsors, recognizing their contribution and detailing the impact it will have on your mission. Many organizations invite volunteers and key event personnel to a special postevent celebration, which provides an opportunity for you to personally thank people, hand out any prizes, and commemorate their efforts.

As the money raised by the event is put to use, follow up with all supporters and donors. Let them know about any progress or successes and thank them again for making these outcomes possible. Remember the impact stories can have—use them in your updates to keep the personal connection strong.

Unless they have opted out of communication, add attendees and donors to your organization's regular communications (you do have these, right?). Send them holiday greetings, newsletters, and invitations to other events.

Begin Follow-Up Plan Right Away

Implement your follow-up plan immediately after the event, while the excitement and connection is still strong in your supporters' minds. It may be tempting to "get to it later," but you'll lose precious momentum if you put off this important work.

Evaluate/Return on Investment

Once the dust has settled, it is time to ask some important questions. What worked well? What did not work? Was it all worth it?

Evaluate Event

Organizations that document activities during all stages of the event’s lifecycle—both what worked and what didn’t work—create a strong foundation for future events. Document areas in need of improvement, steps to repeat (or avoid) in future years, and opportunities to expand or contract the scope of the event. The wrap-up of an event flows right into the early stages of planning for the next fundraising event, so doing this well increases your odds of success next time.

Part of the postevent review should include bringing together the involved individuals, both staff members and volunteers, and reviewing the entire experience from their perspectives. In addition, you should also conduct a brief survey of involved staff, volunteers, and especially attendees. Ask them what worked well and what needed to be improved.

Use the collected data to think through whether the event should be repeated and, if so, what pieces should be kept and what should be scrapped. If an aspect needs to be changed, test ideas to see what approach would be more successful.

Return On Investment (ROI)

One aspect many organizations gloss over is examining the total cost of an event, *including* staff and volunteer time, and comparing the cost to the total value of donations raised by the event. This is known as the event’s Return on Investment.

Calculating ROI

ROI is an accounting formula used to obtain the actual or perceived value of an expense or investment.

$$\text{ROI} = \frac{\text{Funds Raised} - \text{Total Expenses}}{\text{Total Expenses}}$$

More simply, this review is designed to answer the question:
Was this really worth all the trouble?

Document the money and time spent planning, managing, executing, and evaluating the event to measure the total cost to your organization. Don’t limit your definition of “expenses” to money. Staff and volunteer time is also an expense since time spent on the event is time taken away from other activities. Many organizations forget to include time in their calculations. Don’t make that mistake and underestimate the true cost of your event.

On the other side of the equation, be mindful of the nonmonetary benefits of holding fundraising events. While they are not considered in a formal ROI review, factors such as increasing awareness, improving publicity, connecting with new supporters, and feeding your donor funnel may indeed be valuable assets for your organization’s future. It may be difficult to quantify some of these less tangible items, but don’t leave them out of the discussion.



When you review the ROI for an event, it will become quite clear whether the event was a worthwhile fundraising activity or not. You may find that your organization would be better off not holding the event again and instead focusing on other activities that could bring in more dollars at a lower cost. At the very least, ROI will help you identify your most successful events and allow you to focus more attention and time on those.

Begin Planning for Next Event

Now it's time to do it all over again . . . if you decide the overall ROI was positive.

Now is the perfect time to start the initial planning for next year's version of the event. Using the feedback gleaned from attendees, volunteers, and staff, review your planning and make necessary modifications to improve the event.

If you wait too long to do this, it is likely that you will forget many of the helpful details. (It may sound hard to believe now, when the event is fresh, but the specifics will grow fuzzy with time.) Save time later by taking time now to review and reflect on what went well and what could have been better.

Conclusion

Conducting fundraising events can be an overwhelming and time-consuming task. However, they can also be very rewarding in terms of additional money and awareness for your organization and cause that is if they are organized and well planned.

We hope this guide will help you plan and execute a wildly successful fundraising event for you and your organization. Best of luck!

Appendix

Success Story: Habitat for Humanity Winnipeg

[Habitat for Humanity Winnipeg](#) is a great example of a nonprofit that utilized and encouraged a team-based fundraising model in all the right ways. With the friend-to-friend fundraising tools in [Sage Fundraising Online](#), Habitat for Humanity Winnipeg increased its fundraising results and overachieved its 2011 event goal by \$60,000.

Cycle of Hope

Every year since 1993, Habitat for Humanity Winnipeg has organized an annual special event called the [Cycle of Hope](#). According to its website, “Riders journey 1,600 km and raise enough money to enable Habitat for Humanity Winnipeg to build a new affordable home for a family in need.”

“Each rider is required to raise a minimum of \$2,500 to participate,” says Heather Scott, database and administration supervisor for Habitat for Humanity Winnipeg. The organization encourages team members to tap into their own social networks for support to reach that goal.

Sage Improves Fundraising Results

In 2011, Habitat for Humanity Winnipeg chose Sage to help the organization (and its cyclists!) exceed fundraising goals.

“We raised \$60,000 more this year over what we had hoped,” Scott reported happily.

Habitat for Humanity Winnipeg used Sage Fundraising Online to not only create customized registration forms for Cycle of Hope participants, but also to allow event participants to create personalized fundraising pages they could share within their own networks.

Participant Friend-to-Friend Fundraising

People tend to donate to causes their friends ask them to support. With Sage Fundraising Online, Cycle of Hope supporters were able to share links to Habitat for Humanity Winnipeg’s fundraising forms by email, Facebook, and Twitter with easy sharing features. They could even embed special fundraising forms directly into their own personal blog or website.

It wasn’t just about social media. Event participants built a community of supporters that extended online and off. Scott added, “We also have about four meet and greets in the office so new riders can talk and learn from the experience riders on how to fundraise and we offer advice, too.”

Using Advocacy

Habitat for Humanity Winnipeg used Sage Fundraising Online’s Advocacy toolset to specify goals for individual fundraisers and allow supporters to use personalized fundraising pages on Habitat for Humanity Winnipeg’s own website.

“The cyclists expressed [that] the easy-to-use peer-to-peer fundraising tool made it easier for them to reach out to more people they knew,” said Scott about the response to implementing Sage Fundraising Online tools.

Each participant had his own fundraising goal and could upload his own image and write a personal statement. Participants had real-time widgets to track incoming donations and personalized pages which they could promote to their own networks. Fundraisers received notifications whenever donations were received on their page, so they could follow up with personal thank-you notes.

Tapping New Sources of Support

Scott noticed immediately the difference Sage Fundraising Online made, especially as new sources of support materialized. “We received donations from all over Canada, the U.S., and Europe,” said Scott. “In the past, I had only seen one donation come from overseas.”

The donors reached by these participants fundraising on the organization’s behalf may not have had any particular affinity for Habitat for Humanity Winnipeg itself or may not even have lived in the same country, but they had a great affinity to support their friends, so they contributed.

Scott is hopeful the international support will continue in the future. She added, “Next year, I am already looking forward to seeing the growth within that market.”

In Control Under Extreme Circumstances

Enabling supporters with online fundraising tools was critical to Habitat for Humanity Winnipeg’s success, especially when circumstances beyond the organization’s control threatened to delay incoming funds.

Even though a major postal strike occurred in the middle of the campaign, Habitat for Humanity Winnipeg’s ability to collect to donations was not diminished.

Scott recalled, “Using a tool like Sage Fundraising Online made it very easy during our postal strike. Some of our supporters who would have normally mailed in cheques used the online system, and I’m hoping they now see how effortless and quick it is [to donate online, and] will do so from now on.”

Services Make the Difference

While Sage Fundraising Online is easy enough to use on your own, the forms are so flexible that it helps to have an experienced partner help you through the endless possibilities.

Scott agrees, “Thank you Sage and a big thank you to Richard Dietz and his company, Nonprofit R+D, for centralizing our online fundraising capabilities!”



“We raised \$60,000 more this year over what we had hoped.”

Heather Scott
Database and Administration

Sample Event Timeline (printable)

Month 1	Planning <ul style="list-style-type: none"> <input type="checkbox"/> Select your event type <input type="checkbox"/> Determine your goals for the event <input type="checkbox"/> Review previous events for lessons learned <input type="checkbox"/> Set the event date <input type="checkbox"/> Set the midcampaign check-in
Month 2	Setup/Get Sponsors <ul style="list-style-type: none"> <input type="checkbox"/> Create event microsite or event section on current website <input type="checkbox"/> Create online registration process <input type="checkbox"/> Create fundraising systems <input type="checkbox"/> Select and confirm vendors <input type="checkbox"/> Get sponsors
Months 3 and 4	Publicize and Market <ul style="list-style-type: none"> <input type="checkbox"/> Create a marketing plan and calendar <input type="checkbox"/> Create marketing materials <input type="checkbox"/> Promote to past participants and supporters <input type="checkbox"/> Promote to new prospects <input type="checkbox"/> Conduct the midcampaign check in <input type="checkbox"/> Continue to publicize and market
Month 5	Run the Event <ul style="list-style-type: none"> <input type="checkbox"/> Prepare all needed items for event day <input type="checkbox"/> Set up location and registration areas <input type="checkbox"/> Conduct full run through before the event <input type="checkbox"/> Make any needed changes discovered in the run through <input type="checkbox"/> Run the event <input type="checkbox"/> Don't forget to smile and breathe!
Month 6	Follow-Up/Evaluate <ul style="list-style-type: none"> <input type="checkbox"/> Create and implement follow-up plan <input type="checkbox"/> Thank supporters and volunteers <input type="checkbox"/> Evaluate event planning, management, and execution <input type="checkbox"/> Evaluate event ROI <input type="checkbox"/> Decide if event will be held again <input type="checkbox"/> If it will be repeated, formally review and record what went well and what should be improved

Event Planning Worksheet

1. For what issue/need will donations be raised during the event address?
2. What is the target amount for money raised?
3. What is the target amount for other goals set (for example, new donors, new attendees, or increase in volunteers)?
4. What type of event will be held?
 - a. If this type of event has been held before, what lessons can be learned from earlier events?
 - b. If this type of event is new for your organization, what other individuals or organizations can you talk with to learn more?
5. When do you hope to hold the event? Select several potential dates in case of conflicts.
6. What coordinator positions or committees do you need to plan the event (for example, volunteer coordinator, donation coordinator, or publicity committee)?
7. How much time does each coordinator or committee need to accomplish their tasks? From this, work backward from the earliest potential event date to prepare an Event Planning Timeline.

Sample Postevent Attendee Survey

1. What was your favorite part of the event?

2. What was your least favorite part of the event?

Do you have any suggestions to improve those areas?

3. Did you make an additional donation beyond your ticket/entry fee/cover charge?

4. Would you recommend this event to friends and family in the future?

5. If the event has been held before, consider adding:

a. Have you attended this event previously?

b. If so, how many times have you attended this event?

Sample Postevent Volunteer Survey

1. What portions of the event planning and management worked well?
2. What portions of the event planning and management did not work well?
3. Do you have any suggestions to improve those areas?
4. What portions of the event execution worked well?
5. What portions of the event execution did not work well?
6. Do you have any suggestions to improve those areas?
7. Would you recommend volunteering to support this event to friends and family in the future?
8. If the event has been held before, consider adding:
 - a. Have you volunteered to support this event previously?
 - b. If so, how many times have you volunteered to support this event?

Sample Postevent Staff Survey

1. What portions of the event planning and management worked well?
2. What portions of the event planning and management did not work well?
3. Do you have any suggestions to improve those areas?
4. What portions of the event execution worked well?
5. What portions of the event execution did not work well?
Do you have any suggestions to improve those areas?
6. How much time did you spend planning, managing, or executing this event?
7. Do you think we should hold this event again in the future? Why or why not?
8. If we do not hold this event again in the future, what are other event ideas we should consider?



About Sage Nonprofit Solutions

Sage has been serving nonprofit and governmental organizations throughout North America for more than 30 years. The company currently helps more than 32,000 unique not-for-profit organizations increase efficiency and more easily manage their operations through the use of technology. From fund accounting, donor and fundraising management, and fixed asset management, to online donation processing, human resources (HR), payroll, and health care, Sage offers a software product or service to meet the organization's need. For more information, call 800-811-0961 or visit www.SageNonprofit.com. Follow Sage Nonprofit Solutions on [Twitter](#) and [Facebook](#).

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