

Introduction: The Cost of Tradition

Tradition is the illusion of permanenceWoody Allen

Traditions are the glue that hold American families together. Cookouts on Memorial Day at the beach, watching fireworks at the neighborhood park on the 4th of July, and leaving cookies out every Christmas Eve are all traditions that immediately bring back a flood of happy memories for most people. As meaningful as traditions are, sometimes they can come with a cost. In the fundraising world, sticking too closely to longheld traditions can result in missed opportunities for increased revenue. Longheld traditions are comforting, however, and it can be difficult for organizations or committees to embrace new ideas.

The number of nonprofit organizations in this country continue to rise as groups emerge to handle the complex social issues of our times such as autism, disabled veterans, and homelessness. This is a wonderful situation. On the other hand, it also means that there are more organizations competing for the same dollars. Staying competitive in this changing environment may very well mean taking novel approaches and taking advantage of new resources.

Decisions made at every level, from who you invite to how the silent auction is arranged to how you organize the timeline of the evening can have a significant impact on your event revenue. No one is very comfortable talking about money. Ultimately, however, carrying out the mission you are so passionate about requires revenue. Throughout this book, we will provide you with guidance and advice that will help you further your mission and build meaningful longterm relationships with your donors and community.

Chapter 1: Ready, Set, Go!

Failing to plan is planning to fail Alan Lakein

Now that you and your team have decided to embark on the adventure of planning and hosting a charity event, it's time to roll up your sleeves and get ready for some work! Think of your event like a theatrical production. For months before the curtain rises on opening night, there are thousands of hours of blockings, script revisions, set design builds, costume fittings, soundchecks, and rehearsals. The entire production crew, backstage crew, and cast come together to create one meaningful experience for the audience. You and your team are setting out to do the same thing; you want to create an experience for your guests that will linger in their minds and hearts. You want them to leave not only excited about every donation dollar they contributed to your worthy cause, but feeling valued enough that they were treated to an unforgettable experience.

Unforgettable is not synonymous with **expensive.** Guests can have fun, become emotionally engaged, and feel valued without a lush and costly gala. You've heard the saying, "The devil is in the details." That saying applies well to this situation. The small details of greeting each guest personally; having easy checkin and checkout procedures; and integrating experiences that are exciting and fun are important to elevating your guests' experience.

Setting the Foundation

Knowing the Audience and Purpose

Considering the purpose for the event and the audience is paramount in successful planning. You must answer these two questions:

- ü Why are we having this event?
- ü Who is coming or who do I want to come to this event?

Some groups host events to primarily educate potential donors about the cause and hope to raise a bit of money in the process. Others want their members to spend time together having a good time and yet others are focused on the fundraising itself. If this is primarily a fundraising event, then it must be designed as such. The timeline for the event, setup of the room, and all other details will be focused on its relationship to raising more funds. If the event's main purpose is to educate people and to bring in potential new donors, perhaps a midweek luncheon at a board member's house or local restaurant is an appropriate event. In this more intimate setting, people are invited as personal guests, are more relaxed, and more thoughtful and intentional conversations can be held. This issue will be discussed at length in a later chapter.

Knowing your audience or potential audience will assist you in creating the right experience. If you are focusing on an audience of mostly retired individuals, having an event rich in social media experiences will not be enjoyed as much as it would by a young millennial crowd. A mostly military crowd will value different experiences than a surf club.

Defining the Message

Clearly understanding the mission of your organization and being able to communicate it

succinctly is pertinent in determining the message for your event. People, in general, want to be part of something larger than themselves. It is your duty to communicate what that **something** is. If you are an international medical missions group, perhaps your message is “We are traveling the world making a difference in children’s lives one cleft palate surgery at a time.” If you are a horse sanctuary that utilizes abandoned race horses to provide therapeutic riding for disabled veterans, perhaps your message is “Turning tragedy into triumph saving horses, saving lives.” Throughout the event, you will design ways to communicate that message repeatedly. The theme that you select for your event should be congruent with your audience, purpose, and message.

Selecting a Theme

Some organizations have a great deal of leeway with the type of theme they choose. Those that do annual galas routinely rotate themes to provide a new experience for their guests each night. Masquerade balls, Havana Nights, and Roaring 20’s themes are all common in the gala world and attendees can dress up and have a funfilled evening. A more intimate event at a private home or restaurant does not require a theme. It is important that the type and theme of your event are congruent with your organization and mission. For instance, a Brewfest is most likely not a good fit for an foster youth organization. The theme you select may also be contingent upon your budget. A roaring 20’s theme is inherently more expensive to produce due to the lavish nature of the time period.

Setting a Fundraising Goal

Far too many charity organizations do not have a fundraising plan at all. Each special event you host should be part of a larger, comprehensive fund development plan and each event must have its own specific fundraising goals. Things to consider when setting your goals:

- ü What are the specific needs of the organization right now?
- ü How many people will be attending?
- ü What is the demographic of the attendees?
- ü What opportunities will I provide them to donate?

If you want to net \$50,000 from an event but you will only have 100 people, that means each couple will need to donate \$1000 or you will have to solicit large underwriters and sponsors. The fundraising goal should be SMARTspecific, measurable, attainable, relevant, and timebased. (love this!) Your goals will help determine the type of event, venue, and invitees.

Setting the Timeline

Every great theatrical production has a carefully created timeline, both in the actual monthslong preparation of the event and the show itself. Your big event is no different, regardless if it’s a chili cookoff, a gala, or a walkathon.

Preparation for your fundraising event should begin twelve months in advance and incorporate all aspects, including committees, invitations, ticket sales, marketing, auction items, sponsors and underwriters, timeline of the event, and more. Don’t worry, each of these areas is covered in a separate chapter later on.

Let's start by charting out a yearlong production timeline. Even if your "team" is a team of one initially, taking the time to look ahead and see all the steps involved in bringing a successful charity event to fruition can save you tremendous stress later. Sharing this timeline with your Board of Directors and staff (if you have one) can also help rally the troops and raise the sense of urgency. It is easy to be lulled into a daze by the idea that "The fundraiser is a year away. We have plenty of time!"

1012 Months

- Establish purpose for event
- Establish a budget including fundraising goals · Select a date
- Select the theme and venue
- Hire a professional benefit auctioneer specialist
- Hire a graphic designer, if needed
- Select an auction chairperson
- Establish overall committee names and responsibilities
- Research auction software
- Develop a general marketing plan
- Explore the organization's donor support network to develop invitation list
- Develop underwriter and sponsorship levels and benefits
- Research and identify past and potential sponsor and underwriters
- Set the date for the acquisition party
- Identify personnel needs to implement above plans

710 Months

- Recruit and establish committees
- Develop team captain and team member contact lists
- Develop donation forms
- Detail the theme
- Detail the marketing plan
- Begin acquiring underwriters and sponsors
- Develop savethedate postcards
- Develop promotional emails
- Develop and send solicitation letters
- Continue refining and adding to invitation list
- Conduct an acquisition party
- Hire a professional audiovisual company
- Secure benefit auction software if appropriate

57 Months

- Meet with Committee Team Captains to develop committee plans
- Interview caterers and entertainment if necessary
- Select a Master of Ceremonies and/or announcer
- Begin the invitation design
- Mail the SavetheDate announcements
- Continue acquisition of underwriters and sponsors

- Begin auction and event promotion
- Begin to brainstorm the story for the Special Appeal
- Establish a firm deadline for acquisition of auction items
- Track acquisition of auction items
- Ensure event is posted on website and develop event-specific website

35 Months

- Mail the invitations
- Continue to solicit auction items
- Post event on social media and websites
- Create or obtain ability to sell tickets and sponsorships online
- Consult with auctioneer on floor plan and event layout
- Consult with auctioneer on registration, cashiering, and auction claim & removal process
- Consult with audiovisual company about needs for the event
- Continue procuring underwriters and sponsors
- Solidify focus on the Special Appeal
- Develop the Special Appeal donation levels
- Begin securing predonations for Special Appeal
- Secure date for donor thank-you party

13 Months

- Distribute promotional emails and newsletters
- Promote event on social media
- Promote event on home and event websites
- Finalize sponsorships
- Continue to secure predonations for Special Appeal
- Prepare or order bid paddles or cards
- Follow up with all invitees with a phone call or personal visit
- Begin to secure Table Captains
- Develop layout of the seating and auction displays
- Begin to develop auction catalog
- Develop sponsor recognitions
- Confirm with entertainment, Master of Ceremonies, and caterer
- Create live and silent auction display boards
- Finalize checkin and checkout procedures
- Finalize auction item pickup procedures
- Begin to create guest list and seating charts
- Begin to write script for the event

2 Weeks

- Schedule a phone conference with your auctioneer to review the catalog and sequence of live auction items
- Create needed certificates for auction items; verify expiration dates and fine print on all procured certificates
- Create list of volunteer assignments and schedule
- Create needed signage

- If using auction software, assign items to packages and sections
- Finalize script and schedule a dress rehearsal
- Create floor plan for silent auction
- Order consignment items if needed
- Communicate with speakers; ensure they are comfortable with their part

1 Week

- Review final catalog and script with your auctioneer
- Ensure all silent auction items have package numbers attached
- Assign guests to tables; provide for unexpected guests in table assignments
- Provide final guest count to venue and caterer
- Confirm setup for computers and printers at venue; test wifi capabilities
- Hold volunteer training
- Print bid sheets if using auction software
- Organize all auction certificates in numerical order by bid number

1 Day

- Print catalog addendum if needed
- Print final schedule and script; distribute as needed
- Deliver all items to venue if possible
- Ensure all live and silent auction items are entered into auction software
- Review guest list and ensure all guests are entered into event software
- Hold dress rehearsal, if possible

Day of Event

- Sound and lighting check
- Match up bid sheets to auction items
- Setup auction
- Hold dress rehearsal if not possible previous day
- Hold staff and volunteer meeting several hours before event to ensure all roles and responsibilities are clear and to answer any questions

Building Your “A” Team

The date has been confirmed, the theme has been chosen, and it is time to start working on the event. As with any important event, you want to gather the very best people to support the cause. The more committed and informed your “A” team is, the more likely you are to have a successful event. Consider planning your fundraising event like planning your wedding; you wouldn’t let just anyone stand next to you at the altar! You want your friends and family members who are deeply committed to your happiness beside you. The same applies to the people you choose to “stand” with you to plan and execute your event.

The word **committee** probably makes the hairs on the back of your neck stand up. We’ve all sat through plenty of unproductive committee meetings! Committees, or **teams,** as we like to

call them, are essential to the success of an event. You are only one person and you need many others involved to accomplish your goals.

Creating Your Teams

Depending on the size of your organization and event, you could have 1520 chairs on your event team. That sounds exhausting, doesn't it? We've done our best here to come up with the teams that are the most vital to your event's success.

- The Event Captain: Most likely this is the Executive Director, the Fund Development Director, or you Event Coordinator. This depends heavily on the size of your organization and what positions you have in your organization. The Event Captain is responsible for the overall event. It is a wildly important job, as the success or failure of the event will most likely fall on the shoulders of this person. We do not recommend giving this position to a volunteer or a board member.

The Event Captain will oversee all other team leaders and also interact with potential donors, board members, volunteers, sponsors, attendees, and vendors, so choose wisely. You are looking for someone who knows the cause and it is committed to it, who has excellent interpersonal skills, is very organized, and can communicate clearly.

- The Media Team Leader: This person will be responsible to working with your webmaster to create the event page; update your social media as the event gets closer or work with your social media professional; get your event on local calendars; oversee the printing of flyers, savethedates, programs, invitations, and thank you cards; and manage press releases.
- The Auction Team Leader: The Auction Team Leader will oversee both the live and silent auction teams. This is a very big job and requires someone with good contacts in the community and the ability to procure OR the ability to manage people effectively that do. The auction teams will ultimately procure, organize, package, enter, deliver, and setup the items for the live and silent auctions. This will include obtaining consignment items if you use them; locating storage for preparation of bid items; preparing bid sheets or mobile bidding platforms; staging the silent auction; and creating the slide show and displays for the live auction items. At the end of the event, the Auction Team will facilitate delivery of auction items to winning bidders.
- Volunteer Team Leader: This vitally important person will determine the number of volunteers needed; recruit and train them; ensure they are fed and taken care of the day of the event; and manage them during the actual event time.
- Sponsorship Team Leader: Without sponsors and underwriters, events are not financially successful. This team will be responsible, along with the fund development team, board members, and Executive Director, for obtaining event sponsors and underwriters. They will also

manage the design and printing of sponsor/underwriter banners, posters, table recognition or other mutually agreed upon recognition.

- Guest Team Leader: This team is responsible for the registration and check in of guests. They will design and implement the checkin and registration procedures for the event itself; oversee the event software for the evening if it is used; ensure each reception volunteer is trained appropriately; procure and organize the bidder numbers; manage guest registrations both before and at the event; and maintain the guest database through the end of the event.
- Checkin/Check out Leader: This team will design and implement checkin and check-out procedures for the beginning and end of the event; the money handling procedures; the collection of funds; and distribution of receipts. The team leader will ensure that all volunteers in this area are appropriately trained on the use of software, hardware, and procedures. (this could be combined with above – generally the team stays in place the entire event from check in to data entry to check out. – you may need the item pick up team leader – organizing and figuring out how they will deliver the items for the winning guest. By bidder number? By item number and managing the certificate distributions as well as offering concierge delivery to cars or making arrangements for delivery of large items post event.
- Logistics Team Leader: The Logistics Team will oversee all of the working parts behind the scenes, such as valet parking; directional signs; coat check; direction volunteers; registration table location; bars and liquor; easels; podium and microphone; sound system; screens and projectors; temperature and ventilation; trash cans; etc.
- Decorations and Entertainment Team Leader: This is the team with flair and will coordinate making the theme and the evening come to life for the guests. From table centerpieces to cutlery to menu choices to specialty drinks, this team's focus is making everyone have a great time. This team will arrive early the day of the event and set up the table decorations, put up the donor posters, arrange centerpieces, help arrange the silent auction displays, ensure the entertainment arrives and gets through their sound check and takes care of all the details that make for a great experience.

Each of these leaders may have a large number of team members working with them to accomplish the tasks assigned to them. By assigning team leaders and having regular team meetings with the event captain, you can ensure that each team is progressing and keep communication flowing. Limiting the number of team leaders to less than ten also improves the effectiveness of team meetings. Remember, the entire team has to play the same game on the same field together to win the game!

Finding Your Teams

Unless you are a brand new organization, you probably have people who have volunteered with you in the past. Have the Event Captain reach out to them well in advance of the event to

determine how they might be interested in being involved again this year. Taking the time to understand each person's interests, strengths, and challenges is important in helping them find the right place to serve. A person who is great at logistics might be miserable with decorations and entertainment!

If you are in need of team members, start with people who know and understand the cause. Former donors who maybe didn't give a significant amount of money but give regularly would like to have a more active role. If you are an organization that serves people directly, sometimes your own clients or their family members will be wonderful volunteers and they believe in the cause!

You can contact local services organizations such as Rotary, Jr League, Civitan, Kiwanis, and Elks. Have staff members go through their contact lists and ask board members to do the same. Think about contacts through the Chambers of Commerce and young professionals networking groups. Often young professionals don't have the money to attend all the galas, but they will work them as a volunteer. This also helps build a base of future board members as they progress through their careers!

Taking the time to choose, build, and train your teams and team leaders can create an unforgettable event that is both rewarding and financially successful. Poor planning leads to stress, stress, more stress, and oftentimes important details that fall through the cracks.

Maybe include something about having job description for the roles that you review and modify year over year. Having a job description helps with recruitment as you can be clear on what you'll expect from the role. Volunteers are great at recognizing where they will be comfortable. IE CPA's are great at the data entry, check in/out position. Outgoing members or high level donors can make great greeters or table captains. People with sales experience can be valuable at the live auction display and silent auction tables, drawing interest to the items, engaging with the attendees etc. Shyer but well organized folk may be great at item pick up. Just a thought and one of my pet peeves working events with no job expectation outlined! And no clear instructions for the night of event. Really uncomfortable when you are new to the organization's event.