

THE COMPLETE

# ***SPECIAL EVENTS*** Handbook



***PAULINE CARTER***

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## **Handbook**

***PAULINE CARTER***

DIRECTORY OF SOCIAL CHANGE

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# FOREWORD

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Special events have a particular role to play in the fundraising mix and no fundraising strategy is complete without them.

Events can be part of an annual programme or they can be one-off. Whichever it is, they are special for many reasons. They bring supporters to the charity who otherwise may not get involved; they often take place in extraordinary places; they appeal to supporters from all walks of life; they involve extraordinary people, who are sometimes famous; their success is often dependent on the whims of our climate, and if they come off well, they generate not just money but pages of good, free publicity.

So often though, events are misunderstood. Just because they are special, they are not a licence to print money, and many events make financial losses however high profile they are. It takes hard work, dedication and, above all, imagination to turn an idea on a page or in someone's head into an income-generating reality.

This book is a practical guide. Its author knows this subject inside out. She has written it to help you with every aspect of events organisation, from development through to delivery, so that you and your charity have the best chance of making your event a rip-roaring success.

**Judy Beard**

*Director of Development and Alumni  
Imperial College*

# ABOUT THE AUTHOR

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Pauline Carter has been involved in fundraising at a senior level since the early 1980s, first with Save the Children, then with ActionAid. In 1995 she became an independent consultant and has worked with a significant number of charities and organisations. Her work has included offering strategic development and advice on a wide range of fundraising and management issues, including managing special events and capital appeals. Pauline has supported a number of charities with advice on recruitment, selection, coaching and mentoring fundraising individuals and teams. In addition, she has planned and organised a number of conferences.

Pauline is a longstanding member of the Institute of Fundraising and was a member of its executive committee for six years. During this time Pauline was responsible for writing and delivering the special events management courses run by the Institute of Fundraising, and then the Directory of Social Change; additionally, she has also delivered in-house training programmes for charities on a wide variety of fundraising subjects.

Prior to joining the charity sector Pauline was a senior fencing coach working with individuals and teams at the international level. She coached individual women's silver and men's Olympic bronze medal winners in modern pentathlon. She has organised national modern pentathlon and fencing competitions, and lectured on coaching and team development.

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# AIMS OF THIS BOOK

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This book is aimed at all who are managing special and major events and it is written especially for you. It is founded on more than 20 years' experience of managing special events, and more than ten years of writing and delivering training courses for the profit and non-profit sectors. It is a practical guide designed for today's market: a realistic guide to special events management which will benefit both large and small charities and other organisations. It is a new approach to the subject, developed from hands-on experience.

This book is a working guide structured to take the special events organiser through the stages required to plan and implement a major or special event, using proven project planning methods in order to ensure a successful outcome. It is developed with basic 'nuts and bolts' techniques through the conception, planning and management of events.

The book is user-friendly and places particular emphasis on the 'how to do it' and how to avoid unnecessary pitfalls. It includes a selection of case studies from organisations which offer sound and practical advice on the reality of special events management. There are tips from experienced special events managers which include how to be effective and save money. However, staging special events is not just about making money; by creating a well-run, professionally managed event, your organisation will attract new supporters, major donors and companies who want to be a part of your success.

## 1.1 Who should read this book?

This book has been designed to be used either as a practical start-to-finish guide for beginners to special events fundraising, or as a useful reference book into which the more experienced can dip. It is relevant to anyone involved in or considering special events fundraising, and has examples from both large and small charities' experience.

- *Board members and directors* – this book will be a useful guide when you come to decide whether and how special events fit into your overall strategy, and will give you insight into what is involved in organising them. Some board members may be involved in special events fundraising themselves.
- *Chief executives and senior management* – this book will describe the importance of looking at special events within a fundraising strategy framework, and will give you an understanding of the level of resources needed and the need to focus on correct measures of success.
- *Special events fundraisers* – this book will guide you through the techniques required for planning and delivering special events, from project management, budgeting and risk planning through to marketing and delivering a successful event and following up from it. It can be used as a start-to-finish guide, or can be dipped into for inspiration and information at any stage in the event planning process.
- *General fundraisers* – this book will give you an insight into how special events can be used as part of a wider fundraising strategy, and how they link into other areas of fundraising such as corporate and major donors. It may help those who do not have responsibility for special event management but wish to develop their skill base.
- *People in other departments* – special events may impact on your work, either requiring your support or contributing to your own goals and targets.
- *Volunteers on special events committees* – this book will help you to understand your role, and provides tools and ideas for implementing a successful event.

- *Trainers and independent consultants* – this book will provide you with a useful reference resource and the basis of a toolkit for the times when your brief includes special event management.

## 1.2 How to use this book

You can use this book either as a learning guide if you are new to special events fundraising, or as a reference handbook when you want to be reminded of how to do things or gain some inspiration for your next event.

Therefore, the contents are arranged in roughly chronological order. They start by dealing with developing an overall fundraising strategy for events, before going on to individual event project planning and then greater detail about planning and implementing events, including risk assessment and management, the legal requirements and what to do when things go wrong. There is also a list of resources and further reading.

Each chapter is laid out in a similar format to make it easier to find what you need when using it for quick reference. The chapter format includes the following.

- *An introductory paragraph* – this paragraph briefly sets out the purpose of the relevant entry.
- *'How to'* – this is a more detailed section getting to the nuts and bolts of the issues, with practical suggestions for how to use the information provided.
- *Tools* – specific tools and methodologies are highlighted in boxes.
- *Case example* – wherever possible, real-life case examples from a variety of sizes of charity have been included to help illustrate the practical value of the key points covered.
- *Template/checklist* – these are included as hands-on aids for you to copy and use whenever appropriate.
- *Top tips* – a range of professionals in the sector have provided their advice throughout the book.
- *Dos and don'ts* – these summarise the key points in each chapter.

There is an index that includes the tools, case examples and templates to help you find the ones you want more easily.

## 1.3 What are special events?

There are different views in the sector about what makes a special event, and whether or not to include local community fundraising under the same general umbrella. The definition this book uses is:

*A high-profile event, which stands out from normal fundraising events by offering exclusive activities and involving intensive planning and organising, often using the support of a dedicated voluntary steering committee.*

Examples of special events include:

- sporting events
- balls and dinners
- musical and cultural events
- receptions
- exhibitions, fairs and festivals
- conferences and challenge events.

There are more details about these types of event in Chapter 5.

For the purposes of this book, local ‘bread and butter’ events such as coffee mornings and jumble sales are not included within the definition of ‘special events’. Local community fundraising plays an important part in income generation for a charity – local events can spread the word and reach parts of local communities that central fundraising cannot, but the main difference is that usually they are run by small, dedicated volunteer committees, with minimum central support from the charity. While this can give them scope to be more adventurous and to be run more frequently, usually they do not require or attract major sponsorship, or have value added tax (VAT) implications. Therefore, on the whole they are simpler to organise and run, but this is by no means to denigrate the importance of volunteer and local fundraising. However, inevitably elements covering planning and organisation as covered in this book may be of some help, or local groups may be encouraged to plan something larger scale with the support of the charity for which they raise funds.

Increasingly, special events are playing a major part in charities’ fundraising programmes. Because they involve special skills and a good deal of time and dedication to organise, many charities have a designated person or team to plan and manage special events.

Trustees and senior management have to give serious commitment to any special event project or programme. They need to recognise both

the possibilities and limitations of a special event programme, the resources needed to ensure that an event is successful, and a realistic awareness of the risks involved. Often they will be needed to give ongoing support to the special events team by providing useful contacts and attending as and when required.

When planned well, special events can help to support wider organisational strategy, raise the profile of a charity and, of course, raise funds. They can go hand-in-hand with a corporate fundraising programme as a way of encouraging companies to get involved and demonstrate their corporate social responsibility, and as a good way to develop a long-term partnership with a company.

## 1.4 Special events: pros and cons

Pros	Cons
<ul style="list-style-type: none"> <li>● Directly rewarding in terms of income generation</li> <li>● Can support further income generation as part of a fundraising strategy – links to corporate partnerships, major donors</li> <li>● Raises profile for the charity</li> <li>● Generates publicity and promotion for the charity</li> <li>● Manageable as part of a three to five-year strategy</li> <li>● Reaches a wide audience – not only those already interested in the cause, but those interested in the event itself</li> <li>● Attracts new audiences that may be strategically important to the organisation</li> </ul>	<ul style="list-style-type: none"> <li>● Results unpredictable, particularly when insufficient planning has taken place prior to the event</li> <li>● Needs to be planned well in advance</li> <li>● Requires a great deal of time and effort</li> <li>● High-risk element</li> <li>● Potentially high cost to income ratio</li> <li>● Can appear attractive to amateurs, but requires a professional approach to be successful</li> </ul>

# 2 STRATEGY AND PLANNING

---

Sir David Green, a mentor of mine at Save the Children and currently chair of The Dartington Trust, always said that ‘failing to plan means planning to fail’. It is a mantra that I always keep in mind when planning a special event. Before you plan and organise an individual event, it is important to take the time to look at how it fits into the overall fundraising strategy for your organisation, and to understand how this is linked with the strategy for the organisation as a whole. If you work in a relatively small charity you may have responsibility for all fundraising activity, or just for delivering the events targets set out for you. However, it is important to know what the organisational, fundraising and events strategies are, since they set the overall direction and context which your individual event should fit into and help to deliver. This chapter will explain the key features of an events strategy, and give you some tips on how to develop your own.

## 2.1 Establishing a strategy

### 2.1.1 The basis for a strategy

An events strategy sets the framework and direction within which any individual event will be planned. It is not set in stone, and may need to be revised as circumstances change, but it is important to have considered some basic and strategic points, and if necessary to have obtained trustee or senior staff agreement, otherwise you may be undertaking individual events piecemeal and with no clear sense of purpose.

### 2.1.2 Reviewing an existing strategy

Even if you are working within an established framework, it will be worth your while to take a step back to review your strategy. Look at what your charity has been organising in the way of events in the past. Do you want to continue in the same way? Have previous events achieved their objectives? Is the same format still appropriate, or are there good reasons to change, for example: fewer resources in

your events team; change of key staff; change in the focus of the charity; change in giving patterns; change in profitability?

### 2.1.3 Key questions to consider

At this stage of thinking, you need to decide on the following.

- *Should we be doing events at all?* Do you have sufficient resources to invest in an events programme? Are other sources of fundraising more reliable or profitable? Do not carry on doing events just because you have in the past, or start doing them because others are – they are not for everyone, and you need to be clear what your positive reasons are for doing them at all.
- *How do events fit within the organisation's strategy?* What does your organisation exist to do, and is there a natural tie-in with particular types of event? Are there things coming up in the organisational plan which could be supported by events, such as a name change, new campaign or project, or a plan to grow the organisation? Remember that events can help to raise your organisation's profile or launch an appeal, as well as raise money for ongoing activity. Creating synergy between your events plan and your organisational plan can maximise the potential of both.
- *How often will we put on events?* Are you just looking at a one-off to support a particular need, or do you want to develop events as a regular source of income for your charity? Do you want one major event on an annual basis or a regular number of smaller events, or both? It takes a lot of effort and expertise to run a successful event, and however many you do, and whatever their profile, you need to make sure that you are realistic about the level of resources that you will need to do it.
- *How far ahead will we plan and budget for?* Many organisations have a three to five-year rolling plan, but smaller organisations may plan for one or two years ahead. A three to five-year plan will set a clear direction of travel, but you may need to be flexible and keep it under review as the organisational plan changes and depending on your own progress and external circumstances. However, you do need to allow a realistic lead-in time for organising major events (see section 2.6 for more detail).
- *Who needs to sign off or agree the strategy?* Because events can be resource-intensive and high-risk, you need to make sure that the overall strategy is known, approved of and supported at the highest level in your organisation. You may need to prepare a paper outlining the overall strategy for events, highlighting the

benefits and risks, the assumptions (such as the level of resource provided) and contingency plans, and have it agreed by the trustees, chief executive and/or head of fundraising.

- *What is your long-term aim or objective for events?* We will look later at how to set specific aims and objectives for each event, but here we are thinking about what you hope to achieve with an events programme: what is your total financial target, and over how long a period? How many new supporters do you hope to enlist, and is there an overall message about your organisation that you want to get across over several events?
- *What is your past experience with events?* How long did they take to organise, how much did they cost, what was the net income? Look at both successes and problem areas, and consider whether they can be replicated or overcome in your current circumstances, especially with regard to staffing and resources.

## 2.1.4 Some tools for strategic analysis

There are many tried and tested tools used in the wider strategic planning environment which can be applied equally to help you to focus and assess your strategy with regard to special events. These tools provide a framework to help you look at internal factors, such as organisational strengths and weaknesses, as well as prompting you to look at the wider world and how it is likely to impact on what you plan to do.

Remember, these are just tools. In order to be helpful, you need to make sure that good information goes into them, and intelligent analysis is made of the results. Other publications specialising in strategic analysis (see Appendix 1) go into more detail about how to use these and other tools, should you want to pursue this area further.

## SWOT analysis

A SWOT analysis (Strengths–Weaknesses–Opportunities–Threats) is a useful general technique that is extremely helpful at the early stages of a planning process. Using a SWOT analysis will help you to discover how your special event strategy is performing currently, and the key issues that need to be addressed in a new or revised strategy (that is, where you are now, where you could be and what you might need to do to get there). You need to look at what resources you have at your disposal (strengths), where there are gaps in knowledge, experience or resources (weaknesses), what possibilities are out there that you could convert to your advantage (opportunities), and what could go wrong and work against you (threats).

SWOT is just a list of things: it is up to you what you do with them. Do not be put off if you have listed lots of weaknesses and obstacles; do be creative about how you can overcome them. Your SWOT analysis will be a good indicator of what you are capable of: if you have a fantastic team, lots of experience and a well-known charity name behind you, then it is likely that you will be able to plan an extensive programme of large national events; if you are not so lucky, you may want to consider starting small and building up to something larger when you have gained in experience and confidence.

### *Example of SWOT analysis*

Strengths:

- we have a good fundraising team
- we have enthusiastic supporters and volunteers throughout the country
- we have a high national profile

Weaknesses:

- we have not run events before
- we are worried about reputational risk
- we have a lot of new faces on the trustee board
- we do not have a big budget for events
- lack of focus
- too few resources
- poor record of risk management
- inadequate communications within the organisation and with the outside world

Opportunities:

- we are launching a new appeal in six months
- we have a lot of new faces on the trustee board
- we have supportive trustees and senior managers

# POSTSCRIPT

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By embarking on a career in fundraising and special events management you will be involved in one of the most rewarding jobs that you can do, but it is demanding and requires certain qualities. Therefore, in conclusion I would like to offer the following advice.

I have made mistakes. You will make mistakes too, so accept and learn from them. Remember, you cannot do it alone, there are only 24 hours in a day and you will have to learn to trust and delegate. Remember to praise frequently, communicate constantly and be very clear about your objectives.

Learn to be able to assess your own performance, and to accept criticism and advice, trust, be fair and knowledgeable. Set meaningful goals and track your progress. Avoid relying on your organisation to help you to develop your skills. Take responsibility for self-advancement and remember that you will have to manage yourself as well as others, so stay focused.

Do not lose your sense of humour. Try to find a way to relax – it is important to unwind – something that involves physical activity is often best. What is vitally important for your sanity is to retain a sense of perspective.

# APPENDIX 1: BIBLIOGRAPHY

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The following is a list of publications which I hope will be useful in planning and resourcing your special events. (Many of the fundraising and voluntary sector books listed are available through Directory of Social Change: [www.dsc.org.uk](http://www.dsc.org.uk).)

## Chapter 2: Strategy and planning

*The Complete Guide to Business and Strategic Planning* (3rd edn), Alan Lawrie, Directory of Social Change, 2007

*Create!*, Mark Butcher, Directory of Social Change, 2005

*Managing Without Profit: Leadership, Management and Governance of Third Sector Organisations* (3rd edn), Mike Hudson, Directory of Social Change, 2009

*The Mind Map Book*, Tony Buzan, BBC Active, 2006

*Mind Mapping: Kickstart Your Creativity and Transform Your Life*, Tony Buzan, BBC Active, 2006

*Use Your Head*, Tony Buzan, BBC Active, 2006

## Chapter 3: Making it happen

*CC30 Finding New Trustees – What Charities Need to Know*, Charity Commission, 2007

*Cause Related Marketing: Corporate Survey 111*, Katy Neep, Business in the Community, 2001

*The Complete Fundraising Handbook* (5th edn), Michael Norton and Nina Botting-Herbst, Directory of Social Change, 2007

*The Complete Guide to Surviving Contracts*, Alan Lawrie, Directory of Social Change, 2008

*Friends for Life: Relationship Fundraising in Practice*, Ken Burnett, White Lion Press, 1996

*Handbook of Key Customer Relationship Management*, Ken Burnett, Financial Times/Prentice-Hall, 2000

*How to Win Customers and Keep Them for Life*, Michael LeBoeuf, Penguin, 2000

*In Search of Excellence: Lessons from America's Best Run Companies*, Robert H Waterman, Jr, Thomas J Peters, Tom Peters and Robert Waterman, Warner Books, 1988 (out of print, available through Amazon resellers)

*Recruiting Volunteers*, Fraser Dyer and Ursula Jost, Directory of Social Change, 2006

*Relationship Fundraising*, Ken Burnett, Jossey-Bass, 2002

*The Russell-Cooke Voluntary Sector Legal Handbook* (3rd edn), James Sinclair Taylor and the Charity Team at Russell-Cooke Solicitors, Directory of Social Change, 2009

*The Zen of Fundraising*, Ken Burnett, Jossey-Bass, 2006

## **Chapter 4: Making the most of it**

*Charity Marketing*, Ian Bruce, Institute of Chartered Secretaries and Administrators (ICSA), 2005

*Essential Volunteer Management* (2nd edn), Steve McCurley and Rick Lynch, Directory of Social Change, 2007

*Keeping Volunteers*, Steve McCurley and Rick Lynch, Directory of Social Change, 2007

*Marketing Strategy*, Peter Maple, Directory of Social Change, 2003

*Strategic Marketing: Creating Competitive Advantage*, Douglas West, John Ford and Essam Ibrahim, Oxford University Press, 2006

## **Chapter 6: Essentials: legal requirements and risk management**

*CC3 The Essential Trustee – What You Need to Know*, Charity Commission, 2008

*CC20 Charities and Fundraising*, Charity Commission, 2008

*CC49 Charities and Insurance*, Charity Commission, 2007

*Charity and Voluntary Workers: A Guide to Health and Safety at Work*, Health and Safety Executive (HSE), 1999

*Data Protection for Voluntary Organisations* (3rd edn), Paul Ticher, Directory of Social Change, 2009

*Health and Safety Handbook* (2nd edn), Al Hinde and Charlie Kavanagh, Directory of Social Change/Health at Work, 2006

*OG 58 A1: Data Protection Act 1998, Introduction – Data Protection, Freedom of Information and Human Rights*, Charity Commission, 2005

*Private Action, Public Benefit: The Journey Towards a New Charities Bill*, Cabinet Office, 2002

*Voluntary but Not Amateur* (8th edn), Ruth Hayes and Jacki Reason, Directory of Social Change, 2009

## **Chapter 7: If things go wrong**

*Dealing with Difficult People*, Karen Mannering, Chartered Management Institute, 2009

*Managing Conflict*, Gill Taylor, Directory of Social Change, 1999

# APPENDIX 2: LIST OF WEBSITES

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This is a list of websites for organisations which have been featured in the book or will be of general use to special events fundraisers.

## Case studies

Acorns Children's Hospice: [www.acorns.org.uk](http://www.acorns.org.uk)

Charity Challenge: [www.charitychallenge.com](http://www.charitychallenge.com)

Montpellier Creative: [www.montpelliercreative.com](http://www.montpelliercreative.com)

Peckleton Arts: [www.peckletonarts.co.uk](http://www.peckletonarts.co.uk)

Queens' College, Cambridge: [www.queens.cam.ac.uk](http://www.queens.cam.ac.uk)

Rosie's Helping Hands: [www.rosieshelpinghands.org](http://www.rosieshelpinghands.org)

The Brainwave Centre: [www.brainwave.org.uk](http://www.brainwave.org.uk)

Water Aid: [www.wateraid.org/uk](http://www.wateraid.org/uk)

## Challenge event organisers

Across the Divide: [www.acrossthedivide.com](http://www.acrossthedivide.com)

Team Challenge: [www.teamchallenge-company.co.uk](http://www.teamchallenge-company.co.uk)

Greenrock: [www.greenrock.co.uk](http://www.greenrock.co.uk)

## Charities, professional regulation and best practice

Charity Commission: [www.charity-commission.gov.uk](http://www.charity-commission.gov.uk)

Charity Commission for Northern Ireland: [www.dsdni.gov.uk/ccni.htm](http://www.dsdni.gov.uk/ccni.htm)

Directory of Social Change: [www.dsc.org.uk](http://www.dsc.org.uk)

Fundraising Standards Board: [www.frsb.org.uk](http://www.frsb.org.uk)

Institute of Fundraising Codes of Practice: [www.institute-of-fundraising.org.uk/bestpractice/thecodes/](http://www.institute-of-fundraising.org.uk/bestpractice/thecodes/)

National Council for Voluntary Organisations: [www.ncvo-vol.org.uk](http://www.ncvo-vol.org.uk)

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