

THE COMPLETE

# ***SPECIAL EVENTS*** **Handbook**



***PAULINE CARTER***

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## **Handbook**

***PAULINE CARTER***

DIRECTORY OF SOCIAL CHANGE

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24 Stephenson Way  
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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

Threats:

- short timeframe for the new appeal
- may clash with another major charity event
- complacency – we have always done things this way
- other charities have cornered the market with these sorts of events.

### *Analysis*

You need to win trustee and organisational support for an events programme. You probably do not need or want to do a single major event, given the lack of experience on your team, the short timeframe, lack of budget and concern for reputational risk. However, you have a good team and an enthusiastic supporter and volunteer base throughout the country, so you could pilot a smaller scale local event in one region, with the aim of rolling it out across the country to coincide with your new appeal launch. You can make sure that you time it to avoid clashing with another major charity event. With the experience and confidence you build up, you might go on to make this an annual nationwide event, and develop other events for major donors in a year or two. Alternatively, if you win sufficient trustee support for a major event, you might consider contracting out to professionals, or to keep your costs and risks low by ‘piggybacking’ on someone else’s existing event – such as asking a leading art fair to hold a special preview night for your charity.

## **PEST analysis**

PEST (Political–Economic–Social–Technological) is another well-used method for looking at the overall external environment in which you are operating. It works in the same way as SWOT, by listing any key factors under each heading which may have either a negative or positive impact on your plans. The crucial part is to analyse what the overall impact might be, and what your best strategy would be, given the constraints and opportunities that the environment provides for you.

Political:

- Consider the possible impact of a new prime minister or new political party in government.
- Is public service delivery going to continue to be a political priority?
- Are there any changes in legislation which affect you?
- What is the public benefit and what health and safety legislation, discrimination laws and licensing regulations do you need to consider?

Economic:

- What is the likely trend in inflation and interest rates, and how might this affect your charity's activities and your fundraising?
- How will any reduction in public spending affect you?
- What might the 'Olympic effect' be?
- Are you affected by announcements in the Budget (e.g. the impact of income tax cuts on available Gift Aid from donations)?
- Think about impacts on the amounts you aim to raise, at what level you can price and sell tickets, etc.

Social:

- How does the ageing population affect you and your strategy?
- Does immigration have an impact on your activities or fundraising?
- What are the trends in social cohesion versus social fragmentation?
- What is the employment situation?

Technological:

- Are there developments in the internet and communications sectors of which you need to be aware?
- How are people using the internet, phones, etc. differently from when you last set your strategy?
- How do virtual worlds, YouTube and online community forums such as Facebook impact on you?
- Consider whether you are making the best use of your website to advertise your special events programme, inform supporters and enable them to get involved and give more easily.

Unlike the SWOT exercise, there is little you can do to change the external environment (unless that is what your charity does), but you need to be aware of it in order to plan your activities in order to take account of it, create opportunities where you can, and be realistic about constraints.

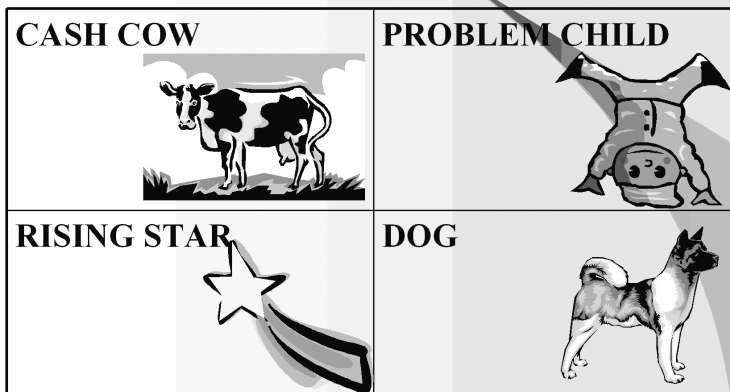
## **Boston Matrix**

This is another tool you can use to assess the success of previous events in order to decide your future strategy: which ones to invest more in, which ones to drop and which ones form part of a reliable core activity and income stream. In using this tool, it is important to be aware of the product life-cycle (see section 3.2.2 for more details), and where your events are on this curve – just because an event has been a runaway success in previous years does not mean that it will continue to be so forever – you may need to find ways of refreshing it or leaving on a high.

To use this tool, first list your current events. Without thinking too deeply about it, write next to each one the reasons why you do it. Be honest: if you do it because it is a fixture, say that it is a fixture. If you do it because it is the chair's favourite, write that down. If you do it for the income, write it down.

When you have finished looking at the actual reasons why you do these events, find out how much each one costs to put on (remember to include staff costs), and how much income each generates. Then try to fit your current events to their place in the following matrix:

## BOSTON MATRIX



Pauline Carter Maximum  
Performance©

### 2.1.4.1 Cash cows

These are special events that have a high market share and are easily reproduced. They have a reputation of being excellent events: tickets sell well, the committees are already set up and although they still require a good amount of time and effort, they will not be not too much of a problem to organise. There is still a need to look at the product life-cycle and to avoid being complacent.

### 2.1.4.2 Rising stars

These are new events requiring time and effort to reproduce, which have winning prospects of becoming a cash cow, and are worth investing in and developing.



### 2.1.4.3 Problem children

These events can consume cash and resources at an alarming rate. They are problems, but can they be turned into a cash cow? They cannot be allowed to continue as they are – one option is to get rid of them, but it may be worth spending some time and effort researching how they can be resurrected. You may be able to change around poorly performing events by being clearer about your goals, better at marketing and making the most of opportunities.

### 2.1.4.4 Dogs

These have a low market share, low growth and do not generate significant cashflow: time for the charity to shut its ears to cries of ‘But we really enjoy these events!’ from supporters and bite the bullet. If they do not sell or achieve their objectives and are a pain to produce, then kick them into touch. Time is money and the charity would be better off spending that time and money on rising stars and even problem children.

#### **Dos and don'ts**

*Do* use these tried and tested tools as something you can use to your advantage, to help provide some structure to your thinking and planning of events.

*Do* review your reasons for doing certain events, and make sure that they are still appropriate.

*Don't* get bogged down with process.

*Don't* keep doing things because you always have done.

## 2.2 Identifying aims and objectives

It is easy to get carried away with the excitement and challenge of putting on an event, but you need to be clear about why you are doing it. You also need to know whether it has been successful, and you can do that only if you have some idea beforehand about what success would look like.

Your events strategy should set out the overall aims and objectives for all the events you plan to hold, often over a longer period, which allows for some individual events to do less well as long as others can pick up the slack. If you do organise just one event a year, there is more pressure on that event to do well, and all the more need for focus and

clarity about what you want to achieve. However, you also need to be clear about the aims of each individual event and how they will contribute to the overall strategy.

This section sets out to take you through the process of identifying clear and realistic aims and objectives for individual events.

### **Mind maps**

For many, mind maps have proved to be an invaluable tool to help their thinking in the strategy and planning processes. Mind mapping was invented by Tony Buzan and is a simple technique that enables you to plot a considerable amount of information and relate and link activities and ideas together in a simple visual way. It is a creative aid that can really help you to work through your thoughts and get them down on paper in a helpful way (see Appendix 1 for Buzan's books on how this tool might help you).

## **2.2.1 Identifying the primary goal or aspiration**

Events can have multiple purposes, but you need to know what the primary goal for your event is, so that you can focus on taking the necessary steps to achieve it. Is your goal:

- fundraising?
- raising the organisation's profile?
- thanking supporters?
- gaining new supporters?

Look at your event in the context of the wider event strategy and decide what the primary goal or aspiration for the event is.

## **2.2.2 Setting specific objectives and targets**

At this point, you can go on to set more specific targets that you want the event to meet.

- *How much do you plan to raise?* £1,000? £10,000? £100,000? Give yourself a specific target, but choose a realistic, even cautious, figure rather than wishful thinking. You have to feel that you can achieve or even exceed it, in order to stay motivated. Make sure that your target figure is the amount you raise after costs, so it represents the real return to your charity. If you plan to increase the level of long-term support arising from this event, put a figure on this as well, and a timeframe in which you are going to measure this.

- *How many people do you want to attend or participate?* What messages do you want to get across through the event? How much wider coverage do you hope to achieve, and do you want this in the local, regional or national press? Remember that profile will be about quality as well as quantity, so add a measure that counts how much *positive* coverage or feedback you get.
- *How many supporters do you want to attend?* The aim here should be for them to enjoy the event, but also to feel even more engaged with the cause, and you may need to find a way to measure this (for example, through feedback forms). If your primary aim is to thank supporters rather than to fundraise at the event, you need to be very clear about how much you can spend, but do remember it is an investment in ongoing support.
- *How many new supporters do you aim to gain?* You may want to measure not only those attending the event, but also those who continue to support the charity.

## 2.2.3 Identifying secondary aims

Most events will have secondary aims. For example: you want to raise £25,000, but you hope to gain new supporters as well; or you want to raise the profile of the cause, and hope that in doing so you will move people to give more to support it. You should identify these aims and set yourself targets, in order to make sure that you do not miss opportunities when organising the detail of the event. However, do be clear about the main purpose of the event, and do not allow yourself to be distracted.

### **Acorns Children's Hospice Marquee Week**

Geraldine Mannion, corporate functions manager

The main focus of this week-long series of events is to fundraise and to gather together volunteers, staff supporters and families to thank them and celebrate the work of the charity. The annual general meeting has been incorporated also as a central feature of the week:

*By law, we have to hold an annual general meeting, but we have found that holding it on the site of one of our hospices, and incorporating it into a full programme of events, makes it far more appealing. This year, we enjoyed the company of almost 100 members of the Association [Friends of Acorns] at our annual general meeting, compared with a mere 30 members in the past when we took the event outside of Marquee Week.*