

Fundraising Event Management

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Layla Moosavi Training and Mentoring

Great event leaves you wanting more!



Photo: Anoop Krishnan <http://anoop.photography>



Hard work behind the scenes ensuring a successful event meets its objectives



**BEHIND
THE SCENES**

Session outcomes

- **what ingredients are essential in managing fundraising events**
- importance of having realistic and measurable **objectives**
- **what preparation and planning is needed**
- how to effectively incorporate events in the fundraising mix

Purpose of Events Fundraising

- **primary purpose is to raise money for a cause**
- a great way to involve an array of different people and the community as a whole
- **help with sector/client recruitment**
- can raise awareness for your cause in a fun way
- **reaching new audiences and a wider potential new supporter base. (ICFM)**

Fundraising Mix

- **Individual (Major Donors)**
- Community (Smaller donations)
- **Companies (Donation and Sponsorship)**
- Trusts and foundations
- **National lottery**
- Government
- **EU (Brexit effect)**
- **Events**
- **Social Media**
- Just giving & Crowd funding



Fundraising ratios

Centre for Interfirm Comparison 2014

- <http://www.cifc.co.uk/Fundratios14.html>
- **Events contributed 2.7% of voluntary income**
- Event income fell by 5.5%
- **Mass participation events also in decline with average gross profit margin 57%, declining c10% YoY**
- Return on investment for events £1.91
- Trusts £7.88, Corporates £5.16, Committed givers £6.16, Major donors £3.52, DM £1.63
- **For sponsored fundraising, the average amount received per donor was £312, with an average donation per sponsor of £23.6.**

Developing Fundraising Mix

Events help:

- diversify our fundraising
- **ensure that we have durable and reliable sources of income to take us into the future**
- developing our fundraising mix and be more sustainable
- **reduce the risk of having too much funding concentrated in one source**

Things to think about

- **Where the special events programme fits in your overall strategic direction and fundraising strategy**
- Importance of clear objectives
- **Brief over view of SWOT and PEST**
- Research and research sources
- **List all the planning activities**

More things to think about

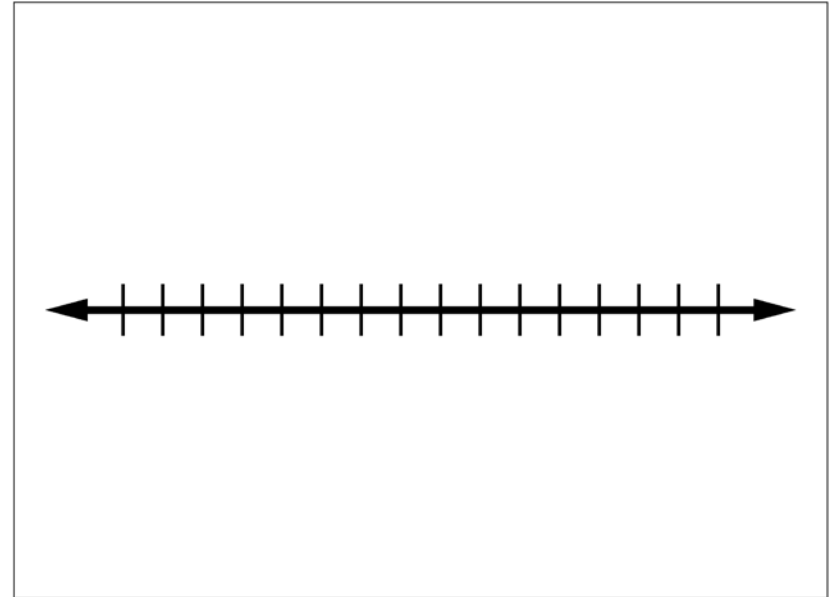
- Timing of key activities for the specific events
- **Providing the organisation awareness of any legal legal/VAT issues related to event**
- Identify key milestones for monitoring and evaluating the event

Beginning with the end in mind!

- What you are intending to do and why?
- What is the motivating factor for doing it?
- Check that your objective fits with your strategic plan and overall aims
- Does your objective fit with your skills and experience?
- Is it realistic given likely time and budget constraints?

Timeline

- What do you want to achieve by when
- **What do you need to do by when**
- What needs to be done by when

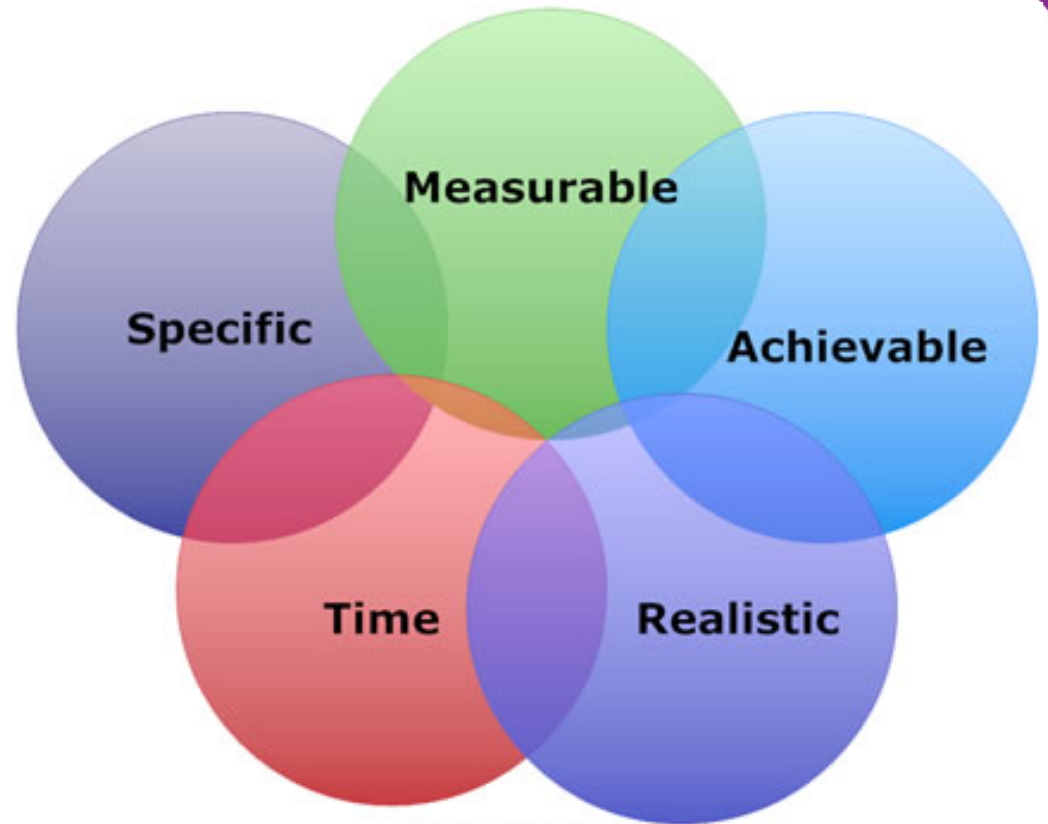


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Set Objectives

- Set objectives..
What do you want and why are you doing it
- Is it to raise awareness, improve your brand, raise funds? Recruit a new audience?





www.learnmarketing.net

SMART



© Mark Smiciklas, Digital Strategist, IntersectionConsulting.com
"Bar Graph" icon by Scott Lewis, from the NounProject.com collection
"Calendar", "People" and "Target" icons from the NounProject.com collection

Objectives(SMART)

- **Specific** **Why are you doing it?**
 - Outcomes e.g. publicity, fundraising, networking, training/education, consultation, information sharing
- **Measurable... Quantity**
- **Achievable- can it be done**
- **Realistic- do we have the resources and what results can we realistically expect**
- **Time bound- by when and how long do we need**

Know the priority of your objectives

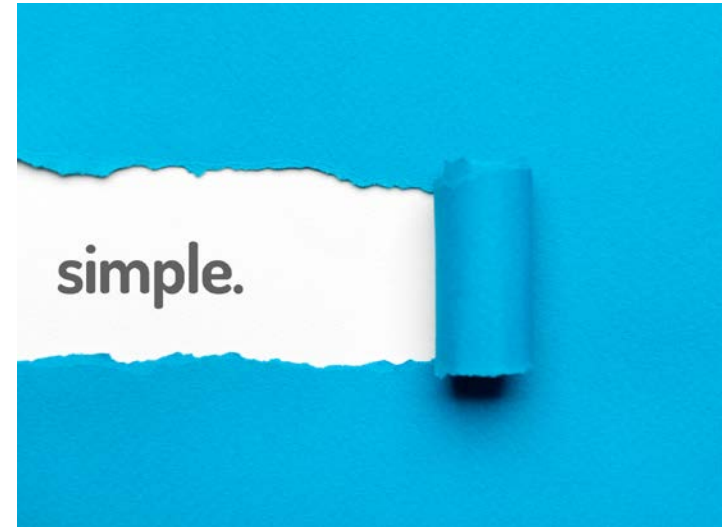
Purpose of Objectives

- **Focus**
- Prevent drift
- **Collaborative working**
- Delegation
- **Resource identification**
- Communications
- **Success criteria**
- Evaluation



Simplify objectives

- **Make your objective simple and easy to understand**
- If you have more than one objective prioritize them into primary and secondary objectives
- **It is easy to lose sight of your objective so before making ANY decisions come back to your objective**



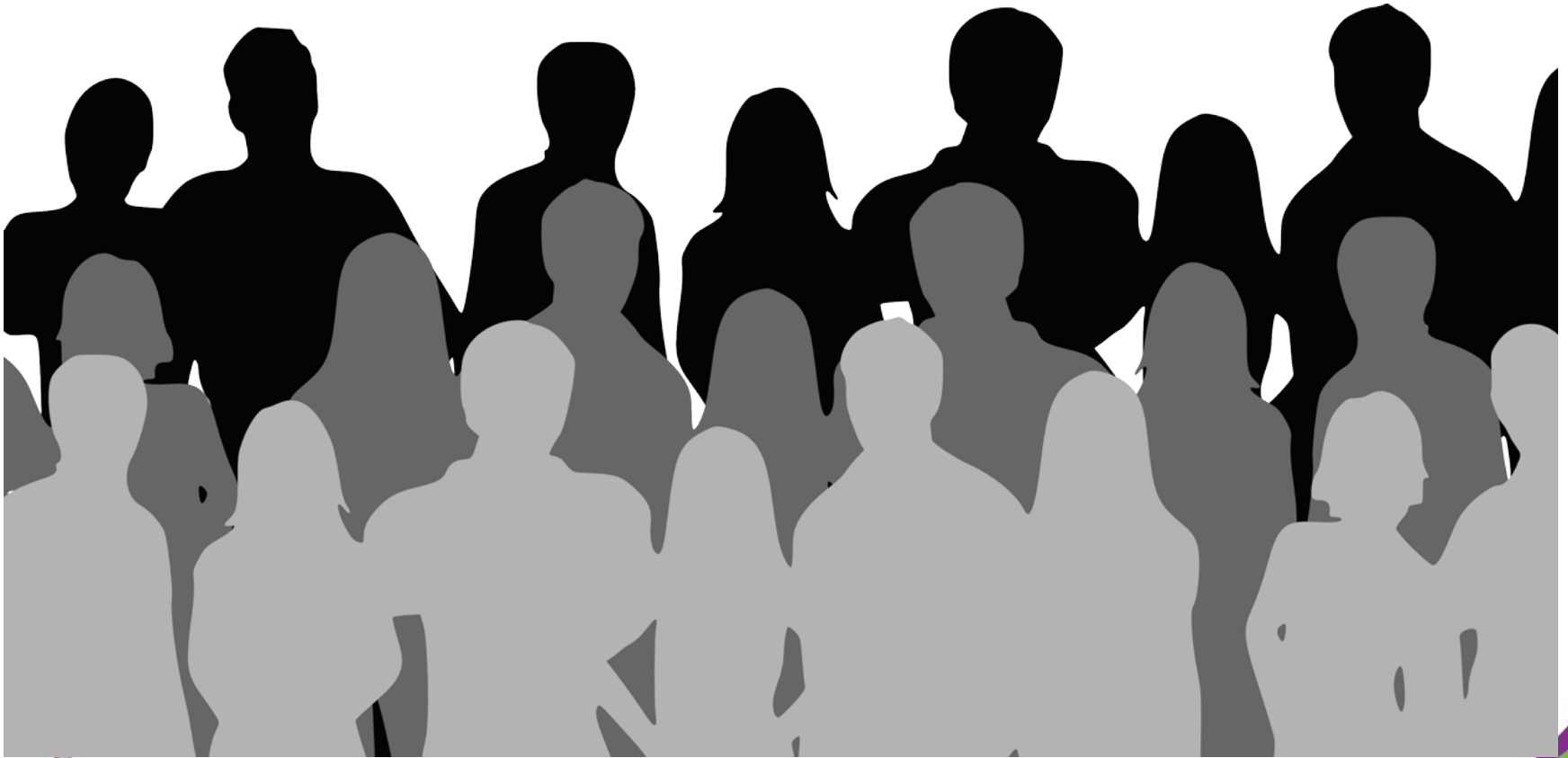
Get creative

- Meets your objective(s)
- Meets audience needs/fears
- Fit with overall charity purpose
- Breaks the boredom barrier (USP)



Who is your audience?

Remember audience and beneficiaries are usually NOT the same



The most important thing to
remember is you must know
your audience.

Lewis Howes

QuoteAddicts.com

dsc

directory of social change

Do you have more than one type?



Audience

- **Who are your audience(s)?**
- What are their expectations?
- **Where are they?**
- How far will they travel?
- **What are their needs and fears? £, status, ego, physical**
- **What will stop them from coming?**
- How do these effect service and marketing?
- **What about secondary audiences trustees, press?**



AUDIENCE FEELINGS

The audience wants you to **SUCCEED**.
They feel brilliant for **ATTENDING**

@alaamoustafa

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Know yourself - and know your audience.

(Tennessee Ernie Ford)

izquotes.com

Fundraising Cycle: Internal and External Preparation

In front of an audience

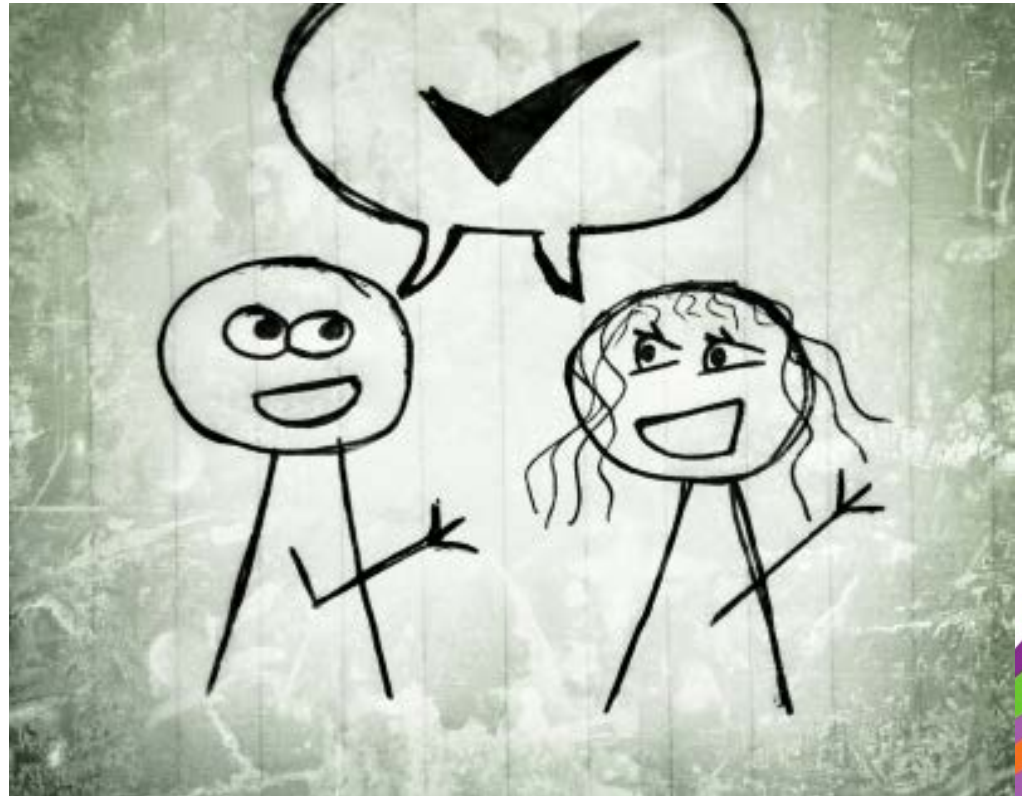


**BEHIND
THE SCENES**



Understanding your organisation

- Vision and Mission
- **Objectives**
- Positioning
- **Strategy**
- Ethics/values



Key messages and USP



- **Key messages – the right message for the right audience**
- **Ensure your overall message is consistent**

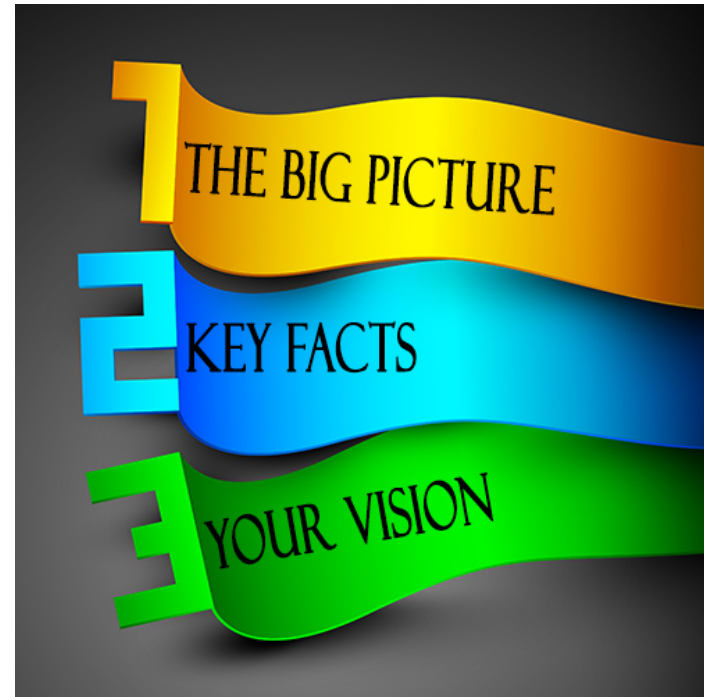


Key message audience

Targeted messages

- Sponsors
- Beneficiaries
- Supporters
- General funders
- Major donors
- Community





Case for support elements

- **Need**
- Vision/mission/values
- **Plans for future**
- Services: features and benefits
- **Unique selling points (USP)**
- Innovation, cost effectiveness, sustainability
- **How you are portrayed in the press**
- Public image and brand
- **Achievements, impacts and outcomes**
- **Who you support**
- Who supports you
- **Who is your audience**
- Financial goals
- **Leadership of organisation**
- Trustees experience
- **How can donors get involved and benefit**
- Benefit to companies
- **Use of volunteers**
- Relationship with funders

Case for Support

For events attendees

- **What is unique about your organisation (USP)**
- Are there similar organisations that do what you do?
- **How does your organisation stand out and differ from similar causes and organisations or service providers?**
- What are the specific needs of your organisations/project?
- **How many people do you directly help?**
- Are you national or local?
- **If you did not exist what would happen?**
- Useful statistics about the need and the problem?
- **Is there a current gap you are trying to fill?**
- Are you a leader in your field?
- What is your objective and why do you need the funding?

Business case for support For events sponsorship

- Charity audience reach- direct and indirect
- **Charity's demographic group of interest to a company**
- Does charity reach any particular demographic sectors ?
- **How beneficial is brand association to a company?**
- Does the charity offer any money can't buy experiences?
- **Do you share the same values?**
- How will this be cost effective?
- **Will there be a return on investment?**

4 stage approach

- **Pre-planning – 6 months**
- **Organising – 5 to 1 month**
- **Final preparation – 1 week before**
- **Post event**



Pre-planning



Importance of Cross team work

Coordinating event activity internally and externally



Team/steering group approach

- **Identify opportunities**
- Pre-empt clashes
- **Gain knowledge**
- Delegation
- **Communications**
- Clear roles



Ideas



Creative prompts

- **Themes** – seasons, exhibitions, national weeks
- **Gaps** – in current offering
- **Trends** – tv progs, music, theatre, sports etc
- **Competitors**
- **Other; letters, colours, countries**

Main Event Outline

**Dissect and analyse
your event Idea
looking at logistics
of the main
elements**



Risk Analysis



Legal implications (1)

- Licence and permissions; Local Authority, countryside rights of way act, emergency services
- Equal access and equalities
- Environmental impact
- Health and safety
- Travel regulations
- Food hygiene



Income vs Expenditure

- Target
- Expenditure
- Available Resources
- Timing
- **Is it realistic and achievable?**



Set Budget

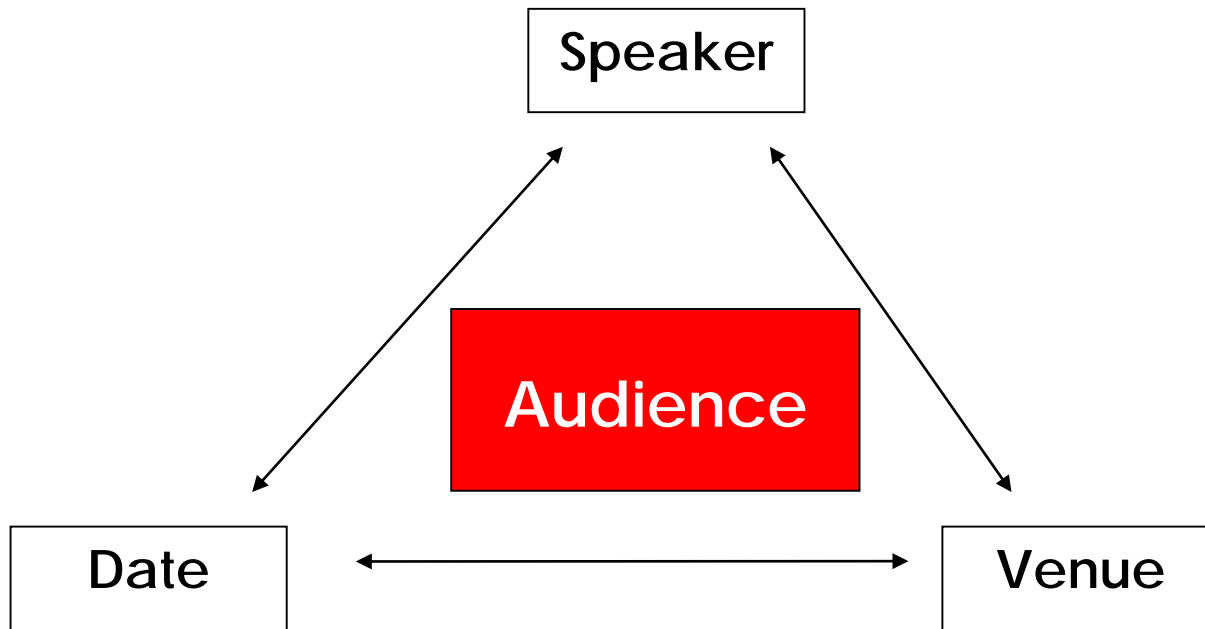
- **Incomes and expenditures**
- **Cost based/Historical plus**
- **Contingency**
- **Realistic - quotes**
- **Best/worst and likely scenarios**
- **Realistic sponsorship**
- **Return on investment**

What can you offer a sponsor?

- **Celebrities**
- **PR**
- **Target demographic/test marketing/product placement**
- **Sales revenue**
- **Advertising platform**
- **Consortium**
- **Online partnership**
- **CSR and pro-bono**
- **Synergy**
- **Membership/access to members**
- **Employee retention/motivation/recruitment**
- **Corporate Hospitality**
- **Brand**



Choosing a date



Choosing a date

considerations

- **The day, season and likely weather**
- Clashes with other events with; the same target audience, school holidays and half terms, national events i.e. cup final, grand national, election days
- **Time to open and close the event allowing for set up, travelling time and public transport links, qualifying heats, need for daylight etc**
- Availability of the venue
- **Availability of entertainment, celebrity or speaker**



Choosing a venue

- **Meet objectives**
- Audience fit
- **Travel considerations**
- Speaker, entertainment, guest and sponsor requirements
- **Venue finder websites/contacts**
- Site visit/venue database
- **Somewhere that is interesting/unique/free!**



Contractual considerations

- **Clarify what exactly is included .. Assume nothing!**
- Equipment use – yours & there's
- **Shared areas/sole use**
- Signage
- **Experience of main contact and manager on the day**
- Request copies of certificates, insurance and risk assessments
- **Review contract don't just sign!**



**ASSUME
NOTHING**

Legal implications (2)

- **Written agreement for corporates**
- Merchandise and trading
- **Health and safety, risk assessments**
- DBS (CRB) checks
- **Participant expenses and equipment**
- Sponsorship; refunds, costs of trip
- **Legal consents in advance**
- Lotteries/raffles

Analysis - ROI

Also called fundraising ratio, can help to decide whether to proceed or not with your event

Net income

Total costs

Income £500 costs £50

Income £12,000 costs £3,000

Income £10,000 costs £10,000

Income £5000 costs £3000

| | A |
|--------------------|------|
| Fixed Costs | |
| Venue hire | 900 |
| AV Equip | 150 |
| Advertising | 300 |
| Entertainment | 150 |
| Speaker | 1500 |
| Photography | 200 |
| Invitations | 300 |

| | |
|-----------------------|------|
| Variable costs | |
| Lunch £15 pp | 1500 |
| Wine £1.50 pp | 150 |
| Thank you cards 50ppp | 50 |
| Fixed Income | |
| Sponsorship | 0 |

Variable Income
 Ticket sales £40 pp
 Raffle £1 pp

| | B |
|--------------------|------|
| Fixed Costs | |
| Stewarding costs | 900 |
| Safety barriers | 1000 |
| Chip timing | 2000 |
| Photography | 200 |
| PA equipment | 400 |
| Advertising | 1000 |
| Portaloos | 500 |

| | |
|----------------------------------|------------|
| Variable costs | Per Person |
| Walker support/sponsorship packs | £3 |
| Refreshments | £5 |
| T- shirt | £2 |
| Thank you cards | 50p |

Fixed Income
 Sponsorship 1000

Variable Income
 Sponsorship £200 pp
 Raffle £1 pp

Draft event outline

working around it

- **Timetable**
 - 1.p.m** guests arrive drinks reception
 - 1.30 p.m.** lunch
 - 2.30 p.m.** Speaker
 - 3 p.m.** coffee and publicity materials
 - 3.30 p.m.** end



Communicate everything to key stakeholders

Steering group

Objective(s)

Audience(s)

Ideas and USP

Legal implications

Budget

Date(s) and venue(s)

Event outline



Participant care

Data management: Payment processes and ticketing

Sponsorship- fees, contracts, benefits

Special equipment- health and safety

Communications plan to all various audiences

Communications plan

- **By audience**
- **Key messages for different stages of event timeline**
- **Identify methods**
- **Frequency of communications**
- **Keep within budget**
- **On-going communications plan**

Communication Channels

Local/National media

- Radio and television interviews
- Journals and magazines
- Club mailing lists

Social media

- Website partners
- Google Ads
- Facebook
- You tube etc
- Blogs and review sites
- Email/SMS/Text giving
- Twitter

Public Relations

- Photo calls
- Stunts/Flash mob
- Competitions
- Communitynewswire.org
- Mediatrust.org

Personal selling

- Trustees/word of mouth
- **Internal staff**
- **Externa; stakeholders**
- **Sponsors**
- **Event participants**

Communications plan

| Message objective | Audience | Key Messages | Method | Timing | Repeat/Pulse |
|-------------------|----------|--------------|--------|--------|--------------|
| | | | | | |
| | | | | | |

Confirmations and communications

- **Confirmations with suppliers/speakers/celebs etc.**
- **Final timetable, briefings & phone numbers** staff, volunteers, media, celebs/speakers
- **Info packs – press/VIPs**
- **Special publications ready**
- **Interviews/photos arranged**

Volunteers

- **Trustees/staff/volunteers**
- **Time commitment**
- **Expertise**
- **Define roles/responsibilities**
- **Recruitment** Scouts, cadets etc, references
- **Legal** data protection, DBS
- **Welfare** health and safety

ORGANISING



Organising

- 1. Start compiling a managers manual**
2. Get quotes - venue, food, transport. Agree terms deposit, final numbers and payment
- 3. Liaison with officials – police, fire, 1st aid, Licenses and permissions, first aid and insurance,**
4. Equipment hire – PA, toilets, marquee, lighting, communications
- 5. Research and agree entertainment, celebs, sponsors, transport**

More Organising

7. **Deposits and contracts**
8. Participant care
9. **Ticket and data processing**
10. Marketing and communications
11. **Risk assessment; hazards & actions**
12. Site plan; entrances & exits
13. **Recruit stewards/volunteers**
14. Contingency plans

Managers manual

- **Title, objective, last amendment, issue date**
- Permissions and licences, approvals
- **Event manager contacts and likely movements**
- Management structure, role and responsibilities
- **Key staff contact numbers/radio call signs**
- Site map
- **Event schedule/timetable**
- Risk analysis and reports
- **New risk reporting form**
- Accident report and logging form
- **Names and number of subcontractors, service providers**

Tips

- **Use one note book**
- **Build contacts database asap**
- **Get meeting in early**
- **Use double entry diary keeping (asset vs liability)**
- **Start your checklist now!**

Contingency Plans

- 'What if' planning
- Likely and unlikely events
- Change/postpone/cancel

Final preparations



Equipment on site

- **Signage**
- **Managers manual**
- **Risk assessments**
- **Licences and permissions**
- **Emergency kit bag**
- **Evaluation forms**

Evaluation

- Monitor your objectives, suggest improvements for next time
- Formal and informal feedback



Evaluation



**WORK
HARD
BUT REMEMBER TO
HAVE FUN**

!!

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