

FUNDRAISING EVENT GUIDE

Event Templates and Best Practices to
Raise More Money at Your Next Event



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United Way

Goal
\$300,000

Raised
\$383,523

\$5,000
Susan and Jim Bower

\$300
Stacy Bell

\$10,000
Hergert Family

\$25,000
John Brown

\$15,000
Abbey McNay

100% Online Giving

Fundraising Event Guide Topics

- **Set Event Goals**
- **Determine Your Budget**
- **Identify Your Target Audience**
- **Event Planning Calendars**
(Cheat Sheets)
- **Promote Your Event**
- 7 ● **When Things Go Wrong**
(Contingency Worksheet)
- **Event Program Checklist**
(Printable Checklist)

INTRODUCTION

Fundraising events are one of the most engaging ways nonprofit organizations can raise money for their cause. In fact, each type of fundraising event attracts a different type of supporter. Did you know 64% of millennials prefer to fundraise through active lifestyle events such as walk/run/cycle events? Generation X prefers to attend smaller, intimate or experiential events. Interesting to know, but you may be asking yourself, how do I create a successful fundraising event?

The key is understanding your audience and tailoring the event experience to their interests. This guide will help you take the steps you need to plan a memorable event that will help you achieve your fundraising goals.

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SET EVENT GOALS

Before you start your to-do list, set SMART goals for your event. Different than activities, goals give you and your team a shared purpose to work towards (i.e. build 100 more homes, protect 50 more children, give 100 animals a new home, grow community awareness). Follow this rule of thumb for setting attainable goals:

Specific

Your goal should be clear and communicate your intended outcome, why it's important, who are the benefactors, who are the contributors, and any potential risks.

Measurable

Your goal should have metrics that can be measured to demonstrate progress. Common goals are: number of new donors, number of volunteers signed up, money raised and number of recurring donations

Attainable

Your goal should push boundaries but also be realistic to attain. This helps maintain momentum and encouragement throughout the campaign.

Relevant

Your goal should not only matter to your organization, but also to your donors. Make sure you close the gap between the ultimate need and the means to fulfill it.

Timely

There is no better time than now to get started on donor engagement. Create a sense of urgency with a start and end date.

SMART GOALS

Fundraising goals are certainly important, but don't forget about other event goals, such as:

#

Of event attendees

#

Of new supporters engaged

%

Increase in social media followers

#

Of views of event video

2:1

Expense to fundraising ratio

Our Goals

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DETERMINE YOUR BUDGET

Sponsors are invaluable to your event. Reach out to local and big businesses to see if they would like to sponsor part, or all, of your event. When you pitch to potential sponsors, you want to demonstrate that their participation will provide a mutually beneficial partnership.

Relevancy

- Invite buyers and employees to attend the event

Clear Connection to Your Cause

- Examples such as home improvement stores supporting building; pet stores supporting animal causes; health orgs supporting disease prevention

Co-branding Opportunities

- Create awareness for the sponsor and their alliance with your organization like adding their logo on materials

Tax Deductions

- Offer the business a tax deductible donation

Giving Day Promotion

- Take a portion of the day's sales to go towards your cause while the buyer receives a discount for shopping that day

Event Hosting

- Give someone from the business or sponsor's team the opportunity to participate or speak at your event or even host the event themselves

“In-Kind” Donations Make a Big Impact

Don't just look to sponsors for money. You can also see if they would be interested in offering “In-Kind” donations. Ask the event venue, local catering companies, restaurants or bakeries and entertainers or artists to support your cause with a charitable donation of their time or services. Partnering with brands and business sponsors saves your organization money and resources while providing them great exposure. Remember to thank partners and sponsors in writing and display their information in printed and digital material before, during and after the event.

Create an Estimated Financial Plan and Expense Budget

Estimate the funding you expect to receive from sponsorships and ticket sales, as well as how much money you believe your event will raise from each fundraising approach (text-to-donate keyword, ticket sales, live auction, social media promotion, online donations, etc.). Then make a comprehensive list of all expenses you foresee incurring so you can highlight items towards which potential sponsors can contribute.



Use an [Excel Template](#) to Plan Out Details



Use a [Gift Calculator](#) to Figure Out Your Budget

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IDENTIFY YOUR TARGET AUDIENCE

Having a clear sense of your ideal donor or supporter is vital to the success of any fundraising event. Being able to identify your target audience is nearly as important as identifying the benefactors of your cause. You want to take the time to create your invite lists and make it easy for Board members, partners, sponsors and others to invite their contacts. Be realistic about how many people will attend. In general, 30% of people invited to an event will attend. You may see more than 60% of people invited donate towards the fundraising goal, so don't just focus your goals on attendance rates. Add Sponsors and Table Captains to your invite list and enlist their help to invite their contacts. To expand your reach from friends and family supporters, you can pose questions to your fundraising event team.

Donors and Volunteers

- Where are they located?
- What job role do they hold?
- Why are they interested in your organization?
- How much have they donated to/supported your mission? This year? Last year? Prior?
- How do they learn about the cause you support?
- What social media outlets are they active on?
- What is their age range?
- Are they married or single?
- What level of education did they achieve?

Board Members

- Where are they located?
- What job role do they hold? Professionally and with your organization?
- Why are they interested in your organization?
- What skills can they lend?
- Is their network a channel for support?
- What role can they play in fundraising, brand awareness or finding corporate sponsorships?

Once you've determined your audience profile, the fundraising style, event type, theme, budget and venue options will fall into place. Having a structured approach, which doesn't have to be complex, will keep you on track throughout the planning process.

Our Target Audience

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EVENT PLANNING CALENDARS

Making sure you give yourself enough time to plan for your event is your first step towards fundraising success. The longer lead time you have, the better chance you'll have at reaching your event goals. Use these event planning calendar templates to help prepare you and your team for key tasks leading up to and after your event.

Gala/Luncheon Recommended Timeline



“At the emotional peak of your event ask, display your live fundraising thermometer seeded with all revenue totals from before and during your event to compel your audience to make donations to reach your goal.”

Want Planning Templates that Go Beyond Events?

Check out these resources that help you stay on track throughout your everyday fundraising initiatives.

- [Annual Fundraising Plan](#)
- [Nonprofit Fundraising Checklist](#)
- [Donor Thank You Templates](#)

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EVENT PLANNING CALENDARS

Run/Walk/Ride

Recommended Timeline

2-3 Months before active event	4-5 Weeks before active event	1-7 Days before active event	Live day of active event	1-3 Days after active event	1-2 Weeks after active event
					
Set-up	Promote	Remind	Inspire	Thank	Engage
<ul style="list-style-type: none"> <input type="checkbox"/> Participant, team, and sponsor sign-up forms <input type="checkbox"/> Peer-to-peer fundraising sign-up form <input type="checkbox"/> Mobile number verification <input type="checkbox"/> Text-to keywords and shortlinks for social sharing <input type="checkbox"/> Participant & donor email confirmations <input type="checkbox"/> Instructions for fundraisers (toolkit) <input type="checkbox"/> Campaign #hashtag 	<ul style="list-style-type: none"> <input type="checkbox"/> Invitations via direct mail, text message, email and social media <input type="checkbox"/> Videos, photos, and #hashtag to showcase your campaign and help your participants promote their fundraising pages <input type="checkbox"/> Featured teams and participants <input type="checkbox"/> Sign-up and donation forms via team captains 	<ul style="list-style-type: none"> <input type="checkbox"/> Participant sign-up deadline <input type="checkbox"/> How many have signed up so far <input type="checkbox"/> Top fundraisers and teams so far <input type="checkbox"/> How much left to reach goal <input type="checkbox"/> Date, time, and location of event via text and email (ongoing updates) <input type="checkbox"/> Tips for training <input type="checkbox"/> Out-of-towner donation option with keyword and shortlink 	<ul style="list-style-type: none"> <input type="checkbox"/> Send any special instructions to captains day-of <input type="checkbox"/> Encourage participants via text all day long <input type="checkbox"/> Send fundraising goal results via text and email <input type="checkbox"/> Instruct everyone to post photos and videos to social throughout the day with event #hashtag <input type="checkbox"/> Show thermometer with all revenue totals and make asks to reach goal 	<ul style="list-style-type: none"> <input type="checkbox"/> Send thank you videos via text, email, and social <input type="checkbox"/> Share goal totals and highlight key teams, donors and sponsors <input type="checkbox"/> Share photos, videos, and highlight reels <input type="checkbox"/> Post personal thank yous on social media for captains, donors, and fundraising participants 	<ul style="list-style-type: none"> <input type="checkbox"/> Announce upcoming campaign dates and details <input type="checkbox"/> Share the different ways participants and donors can get involved <input type="checkbox"/> Plan an internal recap to discuss improvements needed for your next campaign

Golf Tournament

Recommended Timeline

2-3 Months before tournament	1-2 Months before tournament	1-7 Days before tournament	Live day of tournament	1-3 Days after tournament	1-2 Weeks after tournament
					
Set-up	Promote	Remind	Inspire	Thank	Engage
<ul style="list-style-type: none"> <input type="checkbox"/> Participant sign-up form (golfer/guest) <input type="checkbox"/> Payment form(s) for auction items <input type="checkbox"/> Payment form(s) for mulligans <input type="checkbox"/> Donation page for out-of-town gifts <input type="checkbox"/> Text-to keywords, shortlinks and fundraising thermometer <input type="checkbox"/> Email receipt with tee time and confirmations <input type="checkbox"/> Mobile number verification 	<ul style="list-style-type: none"> <input type="checkbox"/> Videos, photos, and testimonials showcasing your upcoming event <input type="checkbox"/> Videos, photos, and testimonials showcasing your upcoming event in order to promote fundraising pages across channels <input type="checkbox"/> The golf course, dinner menu, and sponsors <input type="checkbox"/> Sign up and out-of-town donation forms via social ambassadors 	<ul style="list-style-type: none"> <input type="checkbox"/> Sign-up deadline <input type="checkbox"/> Number of spots remaining <input type="checkbox"/> Date, time, and location via text and email (ongoing updates) <input type="checkbox"/> Out-of-towner donation option with text-to-give keyword and shortlink 	<ul style="list-style-type: none"> <input type="checkbox"/> Send live updates (longest drive, closest to the pin) via text message <input type="checkbox"/> Instruct everyone to post photos and videos to social with your #hashtag <input type="checkbox"/> Use mulligan payment form for golfers to buy extra strokes <input type="checkbox"/> Use auction payment form for winning bids <input type="checkbox"/> Show thermometer with all revenues and ask for final donation 	<ul style="list-style-type: none"> <input type="checkbox"/> Send thank you videos via text, email, and social <input type="checkbox"/> Share goal totals and highlight key donors and sponsors <input type="checkbox"/> Share photos, videos, and highlight reels <input type="checkbox"/> Post personal thank yous on social media and tag participants and donors 	<ul style="list-style-type: none"> <input type="checkbox"/> Announce upcoming campaign dates and details to attendees <input type="checkbox"/> Share the different ways participants and donors can get involved <input type="checkbox"/> Plan an internal recap to discuss improvements needed for your next campaign

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PROMOTE YOUR EVENT

Now that you have your goals set, your audience identified and your plan is in place; how do you get people to attend and contribute towards your fundraising goal? You should consider peer-to-peer fundraising and crowdfunding prior to your event to allow individuals to set up online donation pages that are easily shared with friends, family, colleagues and social networks. Set up a fundraising page at CMNhershey.org, and easily enable active supporters to become fundraising ambassadors for your organization. A ticket to the event could be an incentive to reach a minimum donation amount. **Each individual raises an average of \$613 versus an average traditional one-time gift of \$125 setting you up for a successful fundraising event from the start.**

Attract with Purpose

What will attract supporters? Is it an expert speaker or a celebrity honoree? Is it the story of your organization and the impact you're making? A great fundraising planning idea is to incorporate an interactive activity that educates supporters about your mission, helps them to connect to your cause and clearly see the impact they can make through their generosity. By combining attraction, purpose and storytelling, you'll be able to pull together a fun and memorable event to which your supporters will look forward to attending.

The Early Bird Catches the Worm

Offer incentives like discounted tickets, gift bags and meet and greets with benefactors when people register early instead of waiting until the last minute.

Post Videos on YouTube, Facebook and Instagram

These can be shared by your supporters across their social network of friends, family and colleagues. You don't need a full Hollywood production crew, just a little creativity and a story to tell about why the viewer should get involved or attend your event. Popular videos are those that offer 'behind the scenes' planning or 'sneak peeks' at what's to come at the event. Also, learning about previous benefactors and how their lives improved from donations received is a real driver for event registrations. During the 'day-of' the event, use Facebook Live, Instagram Stories, and YouTube Live to stream special moments during the event so those that couldn't attend can still feel included and offer their support.



EVENT PROGRAM CHECKLIST

To help get you ready for your fundraising event, use this event program checklist to keep you organized before, during and after your event.

Printable Event Checklist to Help You Gather Details

Event Name: _____

Date: _____

Time: _____

Location: _____

Venue Contact: _____

Tasks	Notes
<p>Event Program Details</p> <ul style="list-style-type: none"> <input type="checkbox"/> Welcome <input type="checkbox"/> Auction <input type="checkbox"/> Paddle Raise <input type="checkbox"/> Text-to-Donate <input type="checkbox"/> Thermometer <input type="checkbox"/> The How & Why, The Goal, The Ask <input type="checkbox"/> Facebook Live (During the Ask) <input type="checkbox"/> Thank You 	
<p>Day-of Checklist</p> <ul style="list-style-type: none"> <input type="checkbox"/> Set Up <input type="checkbox"/> Test Run <input type="checkbox"/> Vendor Check-in <input type="checkbox"/> Guest Check-in <input type="checkbox"/> Run of Show <input type="checkbox"/> Promote Keyword & Shortcode <input type="checkbox"/> Close 	
<p>After the Event</p> <ul style="list-style-type: none"> <input type="checkbox"/> Promote Results via all Channels <input type="checkbox"/> Thank Attendees <input type="checkbox"/> Update to Those that Didn't Attend <input type="checkbox"/> Reconcile Donations <input type="checkbox"/> Follow-up on Pledge Fulfillment <input type="checkbox"/> Results Reporting & Analytics 	