Worksheet: Strategizing Your Event

Special events can be an important way to build visibility for your Action Coalition and introduce potential new donors and volunteers to your work. Because of the cost and time required to produce an event, it can be difficult to net a substantial fundraising return, especially compared to other means of raising money. Thus, it is important that you carefully evaluate whether it is worth the investment of resources (including actual costs, staff time and volunteer time) before you move forward with a new event or decide to continue an existing one.

This worksheet and the accompanying evaluation tool are designed to help you think through the strategy and goals of your event (whether newly proposed or longstanding) and to critically examine the return to help you decide whether to launch or continue an event[1].

Name of Event:

_____

Objectives of the event (check all that apply and circle one that you would consider the **primary** objective:

☐ Fundraising

☐ "Friend" raising (i.e. introducing new potential donors to the Action Coalition)

☐ Recognize current supporters

☐ Highlight the Action Coalition's work and/or share news

☐ Generate publicity

☐ Honor an individual/individuals in the field

☐ Other _____

Event Format (luncheon, dinner, etc.): _____

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[1] This worksheet primarily pertains to relatively large-scale events (such as galas, luncheons, golf outings, auctions, etc.) that have at least some fundraising component. Smaller fundraising events that are more about building personalized relationships with specific high-capacity prospects typically yield a longer-term return in the form of a major gift solicitation.

This also does not pertain to events that are primarily a means of delivering on your mission, such as educational sessions or symposia for leaders in the field—although it is worth noting that your Action Coalition should explore options for securing sponsorships and/or charging nominal attendance fees for such events to help cover their cost.

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Proposed Date of Event: _____

Proposed Location of Event: _____

Decision Deadline: _____

Need for Event

- What need does this event address that is not otherwise being met? _____

- If this is a new event, should it replace another existing event? If so, which? _____

Attendance

- Who is our target audience (donors, prospects, sponsors, members, others) and how will

  we generate their interest in attending? _____

Constituency	Invited	Goal Attendance	Conversion Rate (Attendance/Invited)
Current donors/funders/ sponsors			
Prospects			
Members (if applicable)			
Board/other volunteers (be sure not to double count above)			
Other			
Total			

- For existing events, include prior attendance stats below.

	Prior Year	Two Years Prior	Three Years Prior
Invited			
Attended			

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Conversion Rate (attended/invited)			

Roles and Time Required

For the staffing and volunteer sections below, consider what roles different groups will play in planning for, executing and following up on your event. Examples of roles might include:

- Event chair/Co-chairs
- Event planning committee
- Securing sponsorships
- Securing donations (In-kind event goods/services and/or donation items for prizes, auctions, etc.)
- Tickets/Attendance
- Publicity
- Programming/Entertainment
- Logistics
- Follow-Up

Staffing (if applicable)

What role will staff play:

- Before the event_____

- During the event_____

- After the event _____

Staff time required:

Title/Role	Anticipated Time Required

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Total:		

- Does asking staff to dedicate this amount of time to the event detract from their work on other activities of greater importance or value? _____

Volunteers

What roles will volunteers play:

- Before the event_____

- During the event_____

- After the event _____

Number of volunteers required and amount of time requested of volunteers:

Role	Number of Volunteers in this Role	Anticipated Time per Volunteer	Total Anticipated Time (Column B x Column C)
Total:			

- What volunteer group will assume key responsibility for the success of the event? How available is this group to dedicate time to this event? _____

- Does this event have one or two individuals willing to chair the effort? How available are they? _____

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- How are volunteer roles and responsibilities determined and communicated? How will people be trained to fulfill their roles and responsibilities? _____

- Does asking these volunteers to participate in this event fit into their overall strategy? Does it detract from their work on other activities of greater importance or value? _____

Budget

REVENUE	Budget
Sponsorships	$
Ticket Sales	$
On-Site Donations (gift challenges, auctions, prize drawings, etc.)	$
Other	$
Total Gross Revenue	*$*
EXPENSES	
Staff Time (Salaries/Benefits proportionate to time spent on event)	$
Venue	$
Food/Beverage (Catering)	$
Audio/Visual	$
Materials & Supplies	$
Vendors/Rentals	$
Entertainment	$
Other	$
Total Expenses	*$*
NET REVENUE (Total Gross Revenue-Total Expenses)	$

- For existing events, include prior financial stats below.

	Prior Year	Two Years Prior	Three Years Prior
Gross Revenue			
Expenses			
Net Revenue			

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Messaging

- What 2-3 core messages do we want attendees to come away with?_____

- How will we reinforce those messages leading up to, during and after the event? _____

Follow Up

- How will we follow up with event attendees? Who will lead follow up? _____

- How will we follow up with invitees who did not attend? _____

- What is the goal of our follow-up activity (subsequent gifts, future attendance, volunteer

  recruitment, etc.)? _____

Worksheet: Evaluating Your Event

Based on the worksheet above, conduct a pre-event evaluation to inform your decision on whether to hold the event. Following the event, conduct a post-event evaluation to measure your performance, determine whether your Action Coalition should continue the event and consider how to strengthen it in the future.

Pre-Event Evaluation

- Are your attendance goals in line with prior attendance and conversion rates? If not, how do you plan to boost attendance this year? _____

  _____

- Are your financial goals in line with prior years? If not, how do you plan to boost revenue and/or reduce expenses this year? _____

  _____

- Anticipated cost per dollar raised (Total Expenses / Gross Revenue): _____

  Best practices call for a cost per dollar raised of approximately $0.45 to $0.65, with a rule-of-thumb target being that you raise $1 for every $0.50 you spend on your event. However, it is important to note that this best practice is for organizations where staff members are filling a primary event function and the cost of their time is factored into the return. Because most Action Coalitions have few, if any, staff members, they will rely more heavily on volunteers and should, as a result, be able to achieve a lower cost per dollar raised. The guidelines below reflect this fact.

  *If your anticipated cost per dollar raised for a fundraising event is **higher than $0.75**, it is probably advisable to forgo the event in favor of other fundraising activity, unless the event fulfills another vital function for your Action Coalition. If your cost is between **$0.50 and $0.75**, revisit your plans to scale back expenses or seek additional revenue, and consider forgoing the event. If your cost is between **$0.35 and $0.50**, continue to explore opportunities to boost revenue or cut expenses and conduct a thorough post-event evaluation against your goals.*

- Total cost per event attendee (Total Expenses / Total Attendees): _____

  Best practices for cost per event attendee will vary based on the format and size of your event. The most important factor here is to track this over time to identify any "red flags." A spike in costs indicates you may need to boost attendance and/or reduce expenses in future years.

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Post-Event Evaluation

Attendance

- Did your attendance align with goals? If not, what groups over/underperformed and why? _____

  _____

Constituency	Invited	Goal Attendance	Actual Attendance	Actual Conversion Rate
Current donors/funders/ sponsors				
Prospects				
Members (if applicable)				
Board/other volunteers (be sure not to double count above)				
Other				
Total				

- How did actual attendance compare to prior years? What factors do you think contributed to this? _

  _____

  _____

	Current Year Actuals	Prior Year	Two Years Prior	Three Years Prior
Invited				
Attended				
Conversion Rate (attended/invited)				

- If applicable, what would you suggest doing differently to boost attendance next year? _____

  _____

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<u>Staff and Volunteer Time</u>

- Did staff and volunteer time align with estimates? If not, what areas required more time than anticipated and what required less? How might you change roles or practices in the future based on this year's results? _____

_____

_____

Role	Total Staff and Volunteer Time Anticipated (not per volunteer)	Actual Staff and Volunteer Time Required
Total:		

- Did staff and volunteers understand and feel prepared to carry out their roles? Were they effective in these roles? If not, why not? _____

_____

_____

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Budget

- Did your budget align with goals? If not, what areas were over/under and why? _____

  _____

  _____

REVENUE	Budget	Actual	Over/Under
Sponsorships	$	$	$
Ticket Sales	$	$	$
On-Site Donations (gift challenges, auctions, prize drawings, etc.)	$	$	$
Other	$	$	$
Total Gross Revenue	*$*	*$*	*$*
EXPENSES			
Staff Time (Salaries/Benefits proportionate to time spent on event)	$	$	$
Venue	$	$	$
Food/Beverage (Catering)	$	$	$
Audio/Visual	$	$	$
Materials & Supplies	$	$	$
Vendors/Rentals	$	$	$
Entertainment	$	$	$
Other	$	$	$
Total Expenses	*$*	*$*	*$*
NET REVENUE (Total Gross Revenue-Total Expenses)	$	$	$

- How did actual budget compare to prior years? What factors do you think contributed to this? _____

  _____

  _____

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	Current Year Actuals	Prior Year	Two Years Prior	Three Years Prior
Gross Revenue				
Expenses				
Net Revenue				

Return

- Cost per dollar raised (Total Expenses / Gross Revenue):

    - Anticipated_____

    - Actual _____

- Total cost per event attendee (Total Expenses / Total Attendees):

    - Anticipated_____

    - Actual _____

Other Measures

- In what ways would categorize the event as a success (funds raised, new contacts, publicity, etc.)?

    _____

    _____

    _____

    _____

- What lessons were learned, and how might they impact the event in the future? _____

    _____

    _____

    _____

    _____

- Do you believe the Action Coalition should continue holding the event in the future? Why/why not?

    _____

    _____

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