



# Nonprofit Nation Implementation Guide

September 2021, Picking Your Event and Planning It (Fundraising Strategy: Individual Donors)

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## Video Transcript

### Introduction

Hi and welcome to September's lesson: Fundraising Strategy: Individual Donors- Picking Your Event and Planning It. This month we are learning about the beginning steps to put on your next event.

### What are events?

Events are social occasions designed to increase awareness of the organization and its programs and gain monetary support. Their primary function is as a fundraising activity and can be small or big.

### Why do we need to pick the right event and plan it?

Picking the right event increases revenue and awareness. Planning it keeps expenses down so we can maximize revenue.

### When do we need to implement events?

Events are part of the Individual Donor Strategy of the Fundraising Strategy Hierarchy. They are in Level 2 where those activities are most effective with at least 600 donors. Events can take upfront money so some reserve funding is also helpful.

### What/How

#### Picking Your Event

Choosing the right event can mean the difference between an okay event and an event that breaks fundraising goals and everyone talks about for months.

There are three things to consider when deciding on your event. Two come back to one concept- our ideal donor. If you don't know your ideal donor, then put the Ideal Donor lesson on your list to go to next.

Two things to consider when deciding on an event are your participants and sponsors. Here's what I mean:

Your participants should be your ideal donor. They can be existing donors (a warm audience) or people you want to attract that may be a different ideal donor with different demographics than your core ideal donor ( a colder audience). The warmer the audience, the more money you will

make. The colder the audience, the more awareness you gain. Let's talk about what I mean. Existing ideal donors are your core ideal donors. They are typically older. Maybe you want to target a younger audience that still falls into your ideal donor. These people won't be your core ideal donors but they probably will be later. Cultivating them now makes sense. So, while a Gala may attract your core ideal donors, a 5K might not. But a 5K would attract your younger ideal donors. When you are planning your events for the year, a good strategy is to plan a variety of events that target both groups at different times. It also helps with donor fatigue. You can make special invitations and promos tailored to the participants you want to attract. Don't get me wrong. Everyone is invited and can come. But you are lowering expenses and increasing the revenue possibility by targeting the ideal donor.

Your event should attract the audience of your sponsor's ideal customer. To be highly successful in sponsorship dollars, having an event designed to attract the business' ideal donor is almost irresistible. This also helps you spread your sponsorship dollars out over the year and not have to go back to the same sponsors over and over. Putting together the sponsorship packages is also easier because you can customize the packages to what will attract businesses with the same target audience.

Last, the amount of money you want to raise determines the event you choose. If your fundraising goal for this event is \$75,000, then a first time 5K or a bake sale probably wouldn't get you that much money. You may need to look into auctions or galas instead.

## Planning

Here are the major steps common to all events. The details depend on the type of event you are creating and other milestones may be added depending on the type of event.

### *Create Your Budget*

Your budget is the first thing you need to create after you know what event you will execute. Your budget will help you narrow down your choices when putting your event together.

### *Pick Your Venue, Date, and Time*

The venue is a key component to your event. Nail that down and book as soon as possible. You can then start planning the rest of your event.

### *List Out Your To-Dos*

Sit down and list out everything that needs to be done to execute the event. Be prepared to add or subtract things as you go along. You'll learn a lot during the process so be flexible. It may help to think in groups and subgroups. The good news is that you will have a great to-do list next year.

### *Create Your Timeline*

Start with your to-do list. Work backwards when creating your timeline. It helps you plan and know the realistic start date. You can adjust as needed once you have the ideal timeline.

### *Advertise*

Create an advertising plan and log. This will help you keep track of your advertising and give you a place to start next year.

### Execute

After you've created your plan, it's time to execute it. Put the dates on your calendar and work a little every day.

### Review

A few days after the event, take time to deconstruct the event and review what went right, what went wrong, what was missing, and what was confusing. Documenting these things will help you greatly next year. You'll be able to capture ideas and ways to make things better.

That's all for this lesson! Go to the Implementation Guide to help you think through what we've covered. Also, explore the resources provided.

## Your Event Planning Guide

### Step 1: What are the Event Details?

What Type of Event Will You Put Together?

Who is Your Target Participant?

Will You Have a Committee to Help? Who will you ask?

### Step 2: What Are Your Goals for the Event?

Fundraising Goals	
List your goals:	Goal 1: Goal 2: Goal 3:

Event Goals	
List your goals:	Goal 1: Goal 2: Goal 3:

Put these goals in SMART format. Here is a worksheet to help.

[W SMART Goals.docx](#)

### Step 3: What is Your Event Budget?

Here are some samples.

General Event Budget

<https://templates.office.com/en-us/budget-for-fundraiser-event-tm04014288>

For an event like a gala requiring table sales.

<https://www.dojiggy.com/s/fundraising-event-budget/>

A Comprehensive How- To Create an Event Budget

<https://www.dummies.com/business/nonprofits/development/how-to-create-a-budget-for-a-nonprofit-fundraiser/>

### Step 4: Where Will You Hold the Event?

Do you have rental agreements? Where is it located? A good idea if you pay for the space or get it donated. Rental agreements spell out all parties' obligations.

Who is the contact person for your organization?

Who is the contact person for the venue?


What is the address and phone number for the venue? You'll need this information in your promotions.

Keep receipts.

### Step 5: What Sponsors Will You Ask?

<https://members.mathisnps.com/wp-content/uploads/2021/02/Nonprofit-Nation-Sponsorship-Blueprint-1.pdf>

### Step 6: Create Your Sponsorship Package

 Sponsorships Template.pptx

## Step 7: Create Your Timeline

What to-dos need to be done 6 months before the event? Three months? One month? One week? Day of the Event?

Who will be responsible for these to-dos? Make sure you assign those tasks.

## Step 8: Create Your Advertising Plan

 Event Ad Record.docx

## Step 9: Execute Your Plan

Work your to-dos from Steps 7 and 8.



## Step 10: Follow Up/ Review

How will you follow up with sponsors?

What did you say you will do in your sponsorship package?

Complete the Event Review with your team.

 [Event Review Template.docx](#)