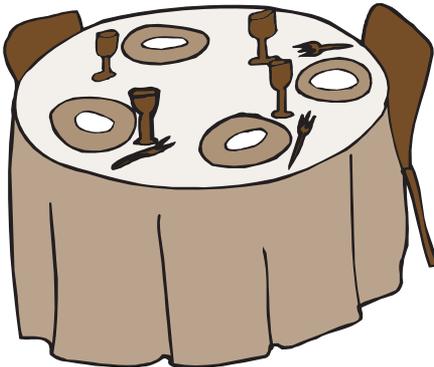


# Making the Most of Your Special Event

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- GENERATING OPPORTUNITIES
- CHOOSING YOUR EVENT
- WRITING THE PLAN
- CREATING THE TIMELINE
- WORKING WITH VOLUNTEERS



# THE ASSOCIATION OF FUNDRAISING PROFESSIONALS (AFP)

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# **Making the Most of Your Special Event**

- ▼ **Generating Opportunities**
- ▼ **Choosing Your Event**
- ▼ **Writing the Plan**
- ▼ **Creating the Timeline**
- ▼ **Working with Volunteers**

**By Betsy B. Clardy, CFRE**

AFP's Ready Reference Series  
Association of Fundraising Professionals (AFP)

**Disclaimer:** The information contained in this booklet is believed to be accurate as of the time of publication, but is subject to change and should not be construed as legal advice. *For questions regarding legal, regulatory, accounting and similar matters a qualified professional advisor should be consulted.*

This booklet is part of *AFP's Ready Reference Series* for professional fundraisers.

Text by Betsy B. Clardy, CFRE.

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# Special Events Generate Opportunities

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**A** charity fundraiser can generate a lot of fun and excitement, reaping short- and long-term financial and organizational support for a nonprofit. Coordinating an evening or weekend special event gives donors, guests and volunteers a memorable experience and builds expanding interest and support for an organization.

Nothing can energize an organization's staff and volunteers like the planning of a special event. With effective follow-up, special events can be the catalyst for major-gift fundraising, giving development professionals opportunities for identifying, cultivating, soliciting and stewarding donors and prospects.

Hosting a successful special event, however, requires manpower, resources, creativity, expert planning and super organizational skills. Is your organization set to go? This *Ready Reference* book-let will help guide your nonprofit, staff and volunteers through the many facets of charitable special events.

If you want to market your organization to the general public, a well-planned special event is the perfect way to tell your story. It is especially effective if the event is tied to your organization's mission. For instance, if your organization is health-related, an event focused on maintaining one's health, such as a walk-a-thon, is most appropriate.

If you are raising funds for intercollegiate athletics, an event starring a famous athlete would provide the stage to highlight your school's ath-

## *Tell Your Story*

letic record or publicize the special needs of the athletic program. If a star athlete highlights your school's program during his or her appearance at your special event, then your school or program will receive immediate credibility among those in attendance. Plus, having a high-profile athlete can attract press coverage for your organization.

Asking local television celebrities to emcee your event brings recognition to your organization because the network anchors oftentimes will talk about your event during their newscasts. If the event is focused on sports and the network sportscaster is the emcee, many times the television station will feature live shots from the event on that evening's newscast. What better way is there to bring attention to your organization or cause? Influential board members are helpful in recruiting these types of emcees for your event as well as securing underwriting. A well-organized staff and well-connected volunteers are vital to the success of an event.

(For a checklist of how to publicize your event, see Appendix A.)

### ***Identify Prospects and Donors***

Through the purchase of tickets and tables for your special event, donors and prospects identify themselves with your organization. Special events present a unique opportunity for development staff and key volunteers to meet new people who might not ordinarily support your organization.

People attend special fundraising events for various reasons. Sometimes people purchase event tickets knowing nothing about the hosting charity, except that they want to see the entertainment or hear the featured speaker. Other times they want to bid on a particular auction item that will be offered during the event. Perhaps attendees are drawn to the prestige of being seen at a particular event. In any case, their presence at

your function offers a chance for future development. Not only are they providing financial support for your organization through ticket or table purchases for the event, but they also may become supporters of your mission after learning more about your organization.

To illustrate, one organization identified a future major donor through a fundraising auction. Noting that the donor made the highest bid for several high-dollar items at the auction, development staff followed up with him, eventually cultivating him for a seven-figure gift. Staff members should always review both silent and live auction bid sheets in the days following an event in order to identify promising donors and prospects. Look at the total support given by each donor.

Development staff members also should seize the opportunity to cultivate donors and prospects in the course of special events. Attendees are enjoying themselves, energy is filling the room, the ambiance is inviting and the food and drink are superb—the perfect setting to get to know donors and prospects better.

Additionally, an event affords a great opportunity to highlight your charity's mission. While you have attendees' undivided attention, tell them about your organization's distinguishing services and goals. If your charity focuses on youth, for example, what better way to cultivate your donors and prospects than to feature the young people served by your organization during the event? The sincerity and appreciation communicated by those served by your organization draw attention to your mission and help steward those attending your special event.

### ***Cultivate Donors and Prospects***

Special events, by their very nature, produce financial and volunteer support for nonprofit organizations.

### ***Expand Support***

Special events tend to draw donors and attendees closer to an organization because they have a stake in its success. Organizations get buy-in from their event attendees because these people have purchased tickets or tables, have possibly bid on auction items and have learned more about your nonprofit organization. Volunteers become more involved with the mission once they commit their time, talent and treasure to further the organization's efforts.

Frequently at a special event organizations honor an individual in the community or the field. Be sure to invite the honoree's family members and friends. Sometimes individuals who would not otherwise support your organization will buy tickets, tables and auction items at events that honor their friends and loved ones.

### ***Recognize and Steward Donors***

Recognizing donors and volunteers in event invitations, printed programs and special presentations is an ideal way to pay tribute to individuals who give generously of themselves to further your organization's goals. By honoring those who serve and support the organization during the special event, your nonprofit strengthens ties to these individuals.

It is always wise to obtain the donors' or volunteers' permission before printing their names in invitations, programs or press releases. Either ask them to sign a release or discuss via telephone how they would like their names to appear and follow up with a thank-you/confirmation letter (See Appendix B for samples of these documents). If they decline the publishing of their names, it is permissible to merely list them as "a grateful patient," an "anonymous donor," an "appreciative parent," a "friend of the institution" or whatever is an appropriate listing.

Now that you know the opportunities resulting from hosting a special event, it is time to evaluate the readiness of your organization for hosting such an event.

# Choosing Your Event

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Is it feasible for your organization to host a special event? Are you ready to undertake event planning? The answers to these questions depend on the size and complexity of the special event you would like to host.

As a general rule, the larger the event, the more work involved in planning and execution and the more likely your organization will raise more money.

You will want to determine the size and scope of your event before announcing it to the general public. The readiness checklist on the next page is designed to help you determine how prepared your organization may be for hosting a major special event.

Organizations should not undertake the work involved in hosting a charity fundraiser unless they are prepared to invest a considerable amount of manpower and funds in the planning and execution of the special event. It takes a tremendous amount of staff and volunteer time to host a successful event. If your organization does not have at least two staff members or volunteers who can devote up to 50 percent of their time for event planning and preparation for the entire time involved, you might want to reevaluate your readiness for hosting a major event.

Another major consideration is the amount of funds required upfront for event planning—funds that will be needed to reserve the event location, caterer and entertainment and to cover the costs associated with invitations. If an organization does not have funds available for these purposes,

## READINESS CHECKLIST

### **Human Resources—Do you have the manpower?**

No. of staff available to assist with event planning \_\_\_\_\_

No. of board members available to assist with event planning \_\_\_\_\_

No. of volunteers available to assist with event planning \_\_\_\_\_

No. of staff, board members and volunteers to work the event \_\_\_\_\_

### **Projected Expenses—Do you have the upfront financial resources?**

Deposit to secure event location \$ \_\_\_\_\_

Deposit for entertainment contract \$ \_\_\_\_\_

Deposit to secure caterer \$ \_\_\_\_\_

Deposit for photographer \$ \_\_\_\_\_

Balance for entertainment \$ \_\_\_\_\_

Balance for event location \$ \_\_\_\_\_

Balance for food \$ \_\_\_\_\_

Balance for photographer \$ \_\_\_\_\_

Cost of printing invitations \$ \_\_\_\_\_

Cost of postage for invitations \$ \_\_\_\_\_

Cost of centerpieces/decorations \$ \_\_\_\_\_

Cost of printing programs \$ \_\_\_\_\_

Cost of favors \$ \_\_\_\_\_

Cost of wine \$ \_\_\_\_\_

### **Sponsorships—Do you have financial underwriters?**

No. and names of event sponsors and underwriters who could be depended upon to support your event:

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it will be necessary to secure underwriting funds early in the planning process. Perhaps board members or key volunteers will be willing to donate funds or goods and services for these purposes. Another alternative would be to obtain funds from a grant that would serve as seed money for fundraising purposes for a particular program that your organization will be undertaking in the future and which will be the recipient of your fundraiser.

Keeping down your cost per dollar raised is fundamental to the success of fundraising events because your organization should not be spending a large percentage of funds raised on event costs. When establishing a new annual event, the first year or two will be the most expensive. Many times, event organizers do not anticipate making much money on a new annual event in the first year. For a well-established event, many fundraisers try to limit expenses to no more than 25 percent of the funds raised; otherwise, the organization could get in trouble with their donors.

One way to help defray expenses is to secure a naming sponsor and other event underwriters for your special event. If your organization has connections to printers, caterers, hotels and so forth, you might want to approach the businesses and ask them to provide the printing for the invitations and programs at a lower cost, or possibly provide a discount for catering or discount expenses for the event venue. For a high-profile event, securing a naming sponsor can equate to raising large sums of money for your organization. It can be a win-win situation, with the naming sponsor receiving widespread recognition for its support and the nonprofit reaping the financial help from the sponsorship. When asking a potential donor to consider a sponsorship, the charitable organization should provide a list of benefits that the sponsor will receive in exchange. (For a sample sponsorship proposal, see Appendix D.)

Once you and event organizers feel secure in your readiness, you can then choose the type of event you wish to host.

### **Goals Determine the Event**

The assessment of your financial and manpower readiness will depend on your goals for hosting a special event. Knowing what you want from an event will help you decide what kind of event to host.

Are you trying to cultivate a small, select group of prospects or donors? If so, a small-scale event could be a successful choice. If you hope to raise maximum dollars from your event, then you might wish to host a weekend of multivenuue events. If you are seeking press coverage along with raising large sums of money, you may want to consider hosting a unique event or a gala featuring guest entertainers. Different types of events offer different opportunities—and different challenges—for your nonprofit. Here are general descriptions and some ideas for special events you might want to consider. Tailor these suggestions to suit your organization’s mission and let your goals shape your creative thinking.

### **Small-scale Events**

Small-scale events can be held in combination with a larger event, either as a pre-event or post-event. They are often very successful because guests realize that only a select group has been invited, and so they tend to feel special.

For example, your organization may be hosting a large reception for many donors and prospects. As a special, smaller event, you could host an intimate dinner with the president of your institution or a guest of honor following the reception. A separate invitation would be sent to a limited group of guests, who would be discreetly ushered to the private dinner party as the reception is concluding. With two round tables of eight to 10 guests, the president can switch tables dur-

ing dessert so everyone has the chance to visit with him or her. This is an excellent way for honored guests to have conversation with the leader of your organization.

Another type of small-scale event that requires minimal planning and low costs is the non-attendance “event.” A fundraising appeal, the invitation invites the guest to a tea party or another type of imaginary function. The invitation contains a tea bag with wording that invites people to enjoy having a special cup of tea in the comfort of their own home, not having to dress up or make special arrangements to go somewhere. Instead, invitees are asked to mail in their tea party ticket cost as a donation. Patrons also are asked to raise a toast to your organization on a specific date and time. This type of event works best with committed donors and volunteers who are familiar with your charity.

## EVENT IDEA

### CELEBRITY SACKERS

*A unique idea for a small-scale event involves working with a large grocery store to raise funds and build awareness for your organization. A “celebrity sackers” event features well-known local personalities who bag groceries for patrons while asking the patron to give a gift to your organization. The patron then swipes a donation card, adding the amount of their gift to their grocery bill. Some grocery stores will match the funds raised during the celebrity sackers event, doubling or tripling the funds raised.*

*Event planners should choose the store location that will attract the most donations for your charity. Many times the store will provide the PR and advertising for such an event, as well as the special donation cards, so be sure to negotiate with the sponsor for these items to save on your event costs. In any case, four weeks out, you will need to have ready the local publicity spots and printed donation cards.*

*Celebrity sackers, often high-profile community volunteers who support your organization, should be well featured in pre-event publicity. In print, radio and television spots, the celebrity sackers urge the public to visit the designated grocery store on the date and time of the event.*

### **Large-scale Events**

There are many types of large-scale events where hundreds of patrons attend the special event, widening a nonprofit's donor base.

Golf tournaments, which also can be planned as small-scale events, are an excellent avenue for publicizing the mission and work of your nonprofit organization. Many times a local celebrity or news anchor will host the event, which will bring added publicity to your charity. Country clubs or local golf courses often will discount the round of golf and reduce golf cart fees so that the sponsoring organization can make a profit on each participant's entry fee. Silent auctions, closest-to-the-pin contests and longest drive contests are often held in conjunction with these types of events that further boost the funds raised. Volunteers can staff these types of events, which sometimes can turn into major fundraising events. Many times these tournaments are held on Mondays, when most golf courses are closed to the general public.

A topic dinner is a unique special event, featuring experts on a wide range of topics leading the dinner discussions. Guests select their first, second and third choice for topics when they respond, mailing their preferences in along with their donations to event organizers. Guests are seated at tables featuring one of their selected topics. The topic dinner can become a much anticipated annual event in which guests are pleased to participate, while providing financial

## **EVENT IDEA**

### **VIP RECEPTION**

*As a bonus to evening events, host a VIP reception for top event donors before the dinner, giving these important guests a chance to socialize with the honoree and have their pictures taken with him or her as a memento. A VIP reception can be used as an incentive for guests to increase their usual table purchases to a higher level, gaining admittance to meet the guest of honor.*

support for your organization.

A twist on the topic dinner is the celebrity interview event. At this type of event, a highly recognized sports figure, nationally known leader or an entertainer is interviewed on stage by a well-known interviewer during the evening (usually following dessert). Celebrity interview events with famous athletes are popular and create a loyal following for your annual event.

## EYE ON EXPENSES

*One word of caution for those planning large-scale events: watch expenses because the more elaborate the event, the more costly.*

To increase funds generated by special events such as the topic dinner or celebrity interview, nonprofits sometimes hold a silent or live auction. For example, during a VIP reception before the feature event, guests would have a chance to visit a silent auction that includes autographed items signed by the celebrity and other related pieces. The silent auction ends before the celebrity interview, and when the interview is over, auction winners are posted on television screens near the stage. Autographed items should come with certificates of authenticity.

## Auctions

When hosting a live auction as part of a larger event, the auction is held at the end of the main activity. Event planners will need to have auction spotters scattered throughout the crowd to alert the auctioneer to bids made by the guests. The auction could be of one item, such as a small dinner party featuring a celebrity guest of honor. Terms of the dinner party can be predetermined or decided by the winner, such as location, menu, hosts, entertainment or discussion topic, or a celebrity guest of honor.

One auction item that can generate excitement among the event attendees and raise more funds for your organization is participating in a sports-related activity. For instance, if the event features a celebrity athlete, you can auction the

opening pitch or the coin flip of a game, donated by the athlete's team.

Staff members who are familiar with cashiering should work the auction checkout, and your charity might consider investing in auction software if auctions are going to be regular fundraisers. A cash box and credit-card slips need to be available for auction purchases.

## VOLUNTEERS

*Volunteers can be very helpful with auctions, assisting with numerous tasks, including:*

- *retrieving the various auction items for the winning bidders*
- *serving as bid spotters for the live auction*
- *working the celebrity picture-taking session*
- *helping to decorate tables the day of the event*

## Galas

Another popular large-scale event is a formal affair: the gala. Galas offer multiple fundraising opportunities for the nonprofit. Not only will your organization receive proceeds through the sale of program ads, tickets, tables and sponsorships, but you also can spotlight other fundraising chances, such as a live or silent auction, a raffle or a sale of items specially designed for the event, for instance autographed posters or the table centerpieces.

## RAFFLE REGS

*Raffles can generate a good return for a fundraiser, but know your state laws. Not all states allow raffles, but others states approve them if you apply for and receive a special permit. Check on the regulations in your state to find out if a raffle is something you can do.*

Usually orchestrated around a theme for the evening, the entertainment, catering and decorations are the secret to a memorable gala. Many galas feature an orchestra or band for dancing, as well as other entertainment that may take the stage during music breaks. The event venue also plays an important role in enticing people to attend the event.

For a higher net gain of dollars raised by a gala, recruit sponsors who will underwrite the major costs of the event. With the gourmet meals, expensive decorations, musical entertainment and staffing demands, galas accrue greater costs than other special events, so sponsorships will help your organization make the most of a gala, raising a greater percentage of funds that will go to the charity rather than defray event expenses.

Multivenue events offer an array of opportunities for patrons. These events are normally held over a two- to three-day period, typically on a weekend, and patrons can choose to purchase a ticket for admission to all events or for only one or two of the events.

### ***Multivenue Events***

A popular idea for a two-day event is to host a table-top event, for which interior decorators, party planners and special-event-related businesses provide decorations for their tables, all following the theme of the event. The table designers receive publicity for decorating a table with their names and businesses listed in the program. The main event is a luncheon where patrons are invited to view all of the various tables before being seated at one of the beautifully decorated tables.

Before the luncheon, guests are invited to several smaller events, each raising money for the nonprofit. A preview cocktail party could be held the evening before the main event, giving patrons the chance to look at the decorated tables while

feasting on wonderful hors d'oeuvres. In the morning before the luncheon, a nationally known gardener or florist can give a lecture. Tickets for the preview party can be set at \$100 per person, lecture tickets for \$35 per person, while luncheon tickets may range from \$75 per ticket to several thousand dollars for a table sponsorship. When you consider the amount of funds that can be raised over a two-day period, the cost per dollar raised is very low, making this an effective fundraiser.

## EVENT IDEA

### ANNIVERSARY CELEBRATION

*Multivenue events celebrating a nonprofit's anniversary often take place over a two- to three-day period. There may be a casual event on a Friday evening, such as a family barbeque with tickets sold at the door, followed on Saturday by a luncheon and a gala that evening. Support for anniversary events mainly comes from vendors or patrons directly related to the organization or its cause rather than the general public. Anniversary celebrations are invaluable, solidifying the nonprofit's base and unifying volunteers, staff and the community served.*

# Writing a Special-Event Plan

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**F**or those responsible for carrying out the plans, working on special events can be stressful—but fun if they are organized. Before embarking on plans for a special event, development staff members should meet with volunteer coordinators to write a special-event plan. Writing a plan enables staff and volunteers to discuss their expectations for the event and reach consensus on how to reach those goals. When setting the agenda for planning meetings, staff should work with volunteer leadership to include basic items for discussion. Normally, the event chair will preside over planning meetings, but it is essential to include staff.

For your function to run smoothly, its special event plan should address:

## **1. The primary purpose of the event**

While an event can benefit a charity in many ways, the planning team needs to identify and hold to a central reason for the event, be it to:

- ▶ raise funds for the organization
- ▶ raise awareness of the organization
- ▶ focus attention on the needs of the organization

## **2. The goals for the event**

- ▶ Who will be the target audience for the event?
- ▶ How many people do you hope to have at the event?
- ▶ How much will you charge for tickets and tables? What will be the different table cate-

gories (for example, \$1,500 tables, \$2,500 tables and \$5,000 tables, with individual tickets costing \$150, \$250 and \$500 each)?

- ▶ How much will it cost to be the naming sponsor (possibly \$25,000)? How much will it cost to be the VIP reception sponsor (possibly \$15,000)? Also consider what amenities will be offered to each underwriting sponsor. For instance, the naming sponsor might receive its name and logo on the invitation and on television screens near the stage during the dinner, three VIP event tables for the dinner and 30 passes to the VIP reception. The VIP reception sponsor might receive two VIP event tables for the dinner and 20 tickets to the VIP reception, where its banner would be displayed. (See Appendix D for a sample sponsorship proposal.)
- ▶ What is the total event fundraising goal? To set a realistic fundraising goal, estimate the number of tables that you expect to sell in each of the categories, along with the number of tickets you hope to sell. A helpful exercise is writing a list of corporations, foundations and individuals you plan to solicit for support and the amounts they will be asked to contribute.

### **3. The event budget**

Every successful event uses a budget to control costs. At this stage, you make spending decisions that will directly affect the net proceeds derived from the special event. To help you budget your event, use the following worksheets.

## EVENT EXPENSES

\$ \_\_\_\_\_ *Venue costs.* What venue will you use for the event and what are the rental costs? It is important to select an event site that is the appropriate size for the number of people that you are expecting to attend. A setting that is too large for the number of guests will make the event look poorly attended, but you do not want to crowd people in a space that is too small.

\$ \_\_\_\_\_ *Catering costs.* Will food and drinks be handled by caterers associated with the venue provider or do you need to find a caterer? Some places will allow you to purchase your wine elsewhere and incur a corkage fee for each bottle they serve. In any case, you will need to obtain a catering proposal with the proposed menu and costs for other services you require.

\$ \_\_\_\_\_ *Security and first-aid personnel costs.* What other requirements are dictated by the venue rental lease? Do you need to use a certain security firm or first-aid personnel?

\$ \_\_\_\_\_ *Proof of insurance costs.* Does the venue require proof of insurance? If you do not have the proper insurance, how much will it cost you to acquire it?

\$ \_\_\_\_\_ *Decorations costs.* What type of decorations will be used and how much will they cost?

\$ \_\_\_\_\_ *Entertainment costs.* Will you be hiring a band or entertainer for the event? Are there associated costs, such as equipment?

\$ \_\_\_\_\_ *Audio/visual equipment rental costs.* What will it cost to hire an audio/visual company to provide the sound system and electronics?

\$ \_\_\_\_\_ *Photography costs.* Will you hire a professional photographer or have staff take event pictures?

\$ \_\_\_\_\_ *Shuttle or parking costs.* Will you need to shuttle guests from a remote parking area to the event or will you have valet parking?

\$ \_\_\_\_\_ *Tent, bathroom facility costs.* If the event is outdoors, you will need to plan for these costs.

\$ \_\_\_\_\_ *Tables and table linen costs.* Plan for table rental, and nice table linens are necessary for a first-class event.

\$ \_\_\_\_\_ *Stage backdrop costs.* Is there a cost for use of a stage? Do you need backdrop curtains to finish off the stage?

## EVENT EXPENSES, CONTINUED

\$ \_\_\_\_\_ *Costs of gifts. How much will you spend on the gifts for the honoree, the event chair and others?*

\$ \_\_\_\_\_ *Cost of guest favors. Will you have favors for the attendees? Will table sponsors receive more expensive gifts?*

\$ \_\_\_\_\_ *Invitation costs. What type of invitation will you send to guests? The invitation's paper stock, number of pages, design and printing can each dramatically alter the production expenses.*

\$ \_\_\_\_\_ *Postage and mailing costs. How much will postage cost for event letters and invitations? If you plan to send out more than 1,000 invitations, you might want to check into the cost of having a mail house address, stuff and mail the invitations. Invitations should be sent with first-class postage to ensure their timely delivery.*

\$ \_\_\_\_\_ *Printing programs and posters. As with the invitations, the design and materials need to be included in the cost of printing programs and posters.*

\$ \_\_\_\_\_ *Other expenses. Are there other expenses that you will incur?*

TOTAL estimated event expenses \$ \_\_\_\_\_

## EVENT INCOME

\$ \_\_\_\_\_ *Amount estimated from table sales*

\$ \_\_\_\_\_ *Amount estimated from ticket sales*

\$ \_\_\_\_\_ *Amount estimated from cash donations*

\$ \_\_\_\_\_ *Amount estimated from gift-in-kind donations*

\$ \_\_\_\_\_ *Amount estimated from sale of program ads*

\$ \_\_\_\_\_ *Amount estimated from sale of centerpieces*

\$ \_\_\_\_\_ *Amount estimated from sale of event posters or raffle tickets*

\$ \_\_\_\_\_ *Amount estimated from silent auction*

\$ \_\_\_\_\_ *Amount estimated from live auction*

TOTAL estimated event income \$ \_\_\_\_\_

## EVENT PROFIT

<i>Total estimated event income</i>	\$ _____
<i>Total estimated event expenses</i>	— \$ _____ _____
<i>TOTAL estimated event profit</i>	\$ _____

### 4. Volunteer leadership

- ▶ How many volunteers will be needed to carry out the event?
- ▶ What type of volunteers will be needed (do they have previous event experience)?
- ▶ Who will serve as event chair or co-chairs?
- ▶ Should you have an honorary chair?
- ▶ Who will serve on the host committee and what responsibilities will they have?
- ▶ Who will serve on the steering committee and what will be their jobs?

The more volunteers you recruit, the greater your chance for success. Volunteers not only help plan and prepare for a first-class event, but their involvement also spells financial support for the event. Recruiting an experienced event chair is essential, along with the appointment of enthusiastic volunteers for the steering committee. The steering committee, the primary planners and workers for the event, works closely with development staff members to carry out the tasks required in hosting a memorable function. Not only do steering committee members handle the event duties, but they also become so invested in the event that they usually turn into some of the organization's most dedicated supporters.

For the host committee, whose primary purpose is to publicize the event and identify potential supporters, it is important to appoint

well-connected community leaders. Your charity will attract new donors and sponsors through their association with your event. As host committee members promote the event, their friends and associates will purchase tickets and tables, becoming new supporters. Frequently, there also is an honorary chair of the event, someone with widespread name recognition to generate interest and attract supporters.

If nonprofits host a special event annually, often the event chair works with a co-chair or “chair-elect” who will run the event the next year. That way, there is someone already very familiar with the event requirements when the time comes for producing the event.

### **5. Finalizing event details—the key to a successful event!**

- ▶ Select the venue.
- ▶ Select a caterer.
- ▶ Plan the entertainment or event highlight. This can be the “wow factor” for your event, so be creative.
- ▶ Hire a photographer.
- ▶ Sign the contracts and pay the deposits. As mentioned in the readiness checklist, these funds need to be included in the event budget or secured from a sponsor.
- ▶ Select the menu.
- ▶ Select an event theme.
- ▶ Design a great invitation. Vital to a function’s success, invitations set the tone and indicate the quality of the event to the invited guests.
- ▶ Design stunning event decorations. Creating an ambiance and setting the stage for a function, exceptional decorations create a “buzz” and build enthusiasm for the event.
- ▶ Plan the appearance of the dinner tables. Select table linens, chair covers, beautiful

china, silver and crystal. Great-looking table decorations and unique favors or “goody bags” will make a lasting impression on your guests. Be sure table centerpieces are at a height that allows guests to converse with each other across the table.

- ▶ How will the event end? A memorable conclusion is very important because you want your guests to leave your event wishing that the event would go on longer.

Your event will be exceptional if you pay close attention to the details!

# Creating the Event Timeline

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**A**fter writing the event plan, the next step is to write the event timeline. This organizational tool will be the road map to a successful event. The first year of planning an annual event takes considerably longer to organize, but in successive years, the planning normally gets easier. Events can be carried out more quickly if you have skilled staff and experienced volunteers. However, it is important to introduce new aspects each year to annual events so that the event does not get stale and will continue to entice guests year after year.

The event timeline illustrated below can be changed to fit your circumstances.

## EVENT TIMELINE

### TWELVE MONTHS OUT

- Determine the purpose of the event.*
- Set the goal(s) for the event.*
- Establish the budget for the event and discuss how you will cover the early expenses associated with the event. (Will you secure underwriters for the event or sell tickets or tables to generate funds to cover expenses?)*
- Make decisions regarding volunteer event leadership.*

## NINE MONTHS OUT

- Name the event chair.*
- Name the honorary chair.*
- Name the honoree.*
- Name the event steering committee (volunteers who will help plan, fundraise and work the event).*
- Name the event host committee (well-known community volunteers who will lend their names to the event, giving credibility that in turn helps with event fundraising).*
- Determine whether you will have a live or silent auction at your event, or both.*
- Name the silent and live auction committees.*
- Order event letterhead with the names of the chair, honorary chair and host committee members.*
- Set the date for the event.*
- Secure the location for the event.*
- Plan the event highlight and entertainment.*
- If hotel rooms are being provided for entertainers or honorees, make hotel reservations.*
- Determine the lighting and audio/visual needs for the event and select vendors for these services.*
- Decide whether you will have a pre-event reception for underwriters or sponsors and when it will be held.*
- Discuss whom to approach for event underwriting and sponsorship and decide who will present the underwriting or sponsorship proposals. If you are considering corporations or foundations as sponsors, find out their deadlines for grant proposals*
- Prepare the underwriting or sponsorship proposals.*
- Present the event underwriting or sponsorship proposals to individuals, corporations and foundations.*

## SIX MONTHS OUT

- Plan the decorations.*
- Determine what type of auction items should be featured and the corporations, vendors and individuals who could donate them. Send letters or make personal visits soliciting the items.*
- Sign venue, entertainment, lighting and audio/visual contracts.*
- Plan the event menu and the pre-event (underwriters' or sponsors') menu*
- Receive food cost estimate from caterer.*
- Draft the invitation list, identifying the individuals at corporations and foundations who should be invited.*
- Have the event chair and steering committee review the list for changes in name, marital status, address and so forth.*
- Obtain missing addresses.*
- Input new names and addresses of individuals, corporations and foundations to the invitation list and make necessary changes.*
- Secure event underwriters. Ask their preference in listing their names in invitations, programs and press releases. Secure copies of their logos for the event materials.*
- Secure event sponsors. Ask their preference in listing their names in invitations, programs and press releases. Secure copies of their logos for the invitation, program, etc.*
- Start applying for the proper permits, licenses and forms if the event will involve a raffle (depends on individual municipal and state/provincial regulations).*
- Start planning for the press coverage. (See Appendix A for a sample checklist for publicizing your event.)*

## FOUR MONTHS OUT

- Design invitations and select the paper.*
- Decide if favors will be given to event attendees; if so, select and place an order for the gifts.*
- Determine the cost of goods and services given to each attendee (you will need to know this for quid pro quo letters and event receipts).*
- Prepare press releases regarding the event, listing event underwriters and sponsors.*
- Prepare event solicitation letters for prospective table buyers and have the event chair personally sign each letter.*
- Mail table and ticket solicitation letters with event reservation forms (see Appendix E for Special Event Reservation Form).*
- Set up online giving information for ticket and table orders and place it on your website.*

## THREE MONTHS OUT

- Set the date with the event chair for the event menu tasting.*
- Pick up the auction items.*
- Order the invitations from the printer.*
- Select a postage stamp for the invitations (check with the post office to see if there is a stamp that reflects your mission or matches the theme of your event).*
- Hire a photographer.*

## TWO MONTHS OUT

- Attend the menu tasting with the event chair.*
- Select the type of wine to be served.*
- Select the type and color of table linens.*
- Choose the type of literature that your organization will have available at the event. Decide where it will be placed at the event, for instance, at each place setting or on a table in the lobby.*

## **FIVE WEEKS OUT**

- Mail the invitations. Invitations should be sent first-class mail for prompt delivery. (Factor in postal and school holidays and mail invitations prior to bill paying times.)*

## **FOUR WEEKS OUT**

- Receive checks and cash for table and ticket purchases.*
- Send thank-you letters and receipts to those purchasing tickets and tables (this letter contains amount of goods and services given—see Appendix C for Sample Quid Pro Quo Letter).*
- Begin the seating arrangements of guests (this can be done with staff and volunteers working together).*
- Write the script for the event and send a draft to the master of ceremonies and the honoree.*
- Purchase gifts for the event chair and honoree.*
- Telephone the caterer, venue personnel, lighting vendor, audio/visual vendor, florist, hotel and honoree to discuss details and confirm time for the event.*
- Check to see if decorations are ready.*

## **THREE WEEKS OUT**

- Prepare the program and proofread (include underwriters, table sponsors and a special thank-you list, along with information about the honoree or entertainer).*

## **TWO WEEKS OUT**

- Send the program to the printer.*
- Prepare the schematic table location poster.*
- Prepare individual table seating cards for each guest (“You are seated at Table No. 1”).*

## ONE WEEK OUT

- Continue seating arrangements of guests.*
- Ask event chair and leadership to check the seating (do you need to relocate any guests in order to avoid problems).*
- Check with decorations chair, auction chair as a follow-up.*
- Nonprofit organization meets with people working event registration to update them on details.*
- Send photographer a schedule for the event and a list of people who should be photographed.*

## DAY OF EVENT

- Set up lighting and audio/visual equipment.*
- Set the tables and put out favors.*
- When the decorations arrive, set them up (volunteers and staff).*
- Arrange the auction items (auction committee members and staff).*
- Set up the registration tables (staff).*
- Set up the food and drinks (caterer).*
- Meet with event workers who arrive two hours prior to the event.*
- ENJOY!*
- Clean up after the event.*

## WEEK FOLLOWING EVENT

- Send out thank-you letters to donors, auction buyers, sponsors, event volunteers and the honoree.*

***Essential  
Follow-up***

After your event is over, don't forget these important tasks:

- **Visit top donors and event supporters to begin the event's true development work.**
- **Review auction bid sheets to find new prospects.**
- **Start planning for next year's event!**

# Working with Event Volunteers

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**V**olunteers play a vital role in planning and executing a successful event, and it is crucial that you recruit volunteers who are supportive of your nonprofit organization and its mission. Event volunteers are asked to give generously of their time and resources to help your nonprofit achieve its goals, so it is important that staff cooperate fully with these volunteers.

Before recruiting volunteers, the event chair and development staff should discuss the level of volunteer involvement needed for the planned event:

- **What type(s) of volunteers are needed?**
- **What skills will be needed?**
- **How much time will volunteers be asked to commit to the event?**
- **Will the nonprofit organization be asked to provide volunteers or will the volunteer leadership recruit event volunteers?**
- **How many volunteers will be needed?**
- **Will there be paid event planners involved?**

Once these questions are answered, volunteer recruitment can begin.

There are a variety of ways to recruit event volunteers. If the event chair is well known in the community, people who know him or her may volunteer their time, often because they have worked with the chair on other events. Frequently the event chair will ask friends or acquaintances known for particular talents to join the event

team, and others on the team may recommend possible recruits. Corporate sponsors will sometimes provide event volunteers. Other times, people will volunteer themselves, asking if they can work on the event team. The event volunteer team can include many types of people, but it is imperative that they all share the same vision for the event.

The nonprofit staff members will be called on to provide support services for the volunteer team. Normally, paid staff members prepare correspondence, research addresses, keep track of event income and expenses, pay event invoices, acknowledge funds received and auction items given, input guests names for the invitation list and event registration, as well as handle the registration table(s) during the event.

### **Recognizing Your Volunteers**

It is the nonprofit's responsibility to thank event volunteers. Appreciation can be expressed in a variety of ways:

- **Host a volunteer appreciation event in the weeks following your planned event.**
- **Give the event chair a gift during the event.**
- **Send flowers to key volunteers on the day of the event.**
- **Send thank-you notes and cards to volunteers following the event.**
- **Place an ad in the local newspaper thanking volunteers and event sponsors for their support.**

Remember, you can never say thank you too much!

Generally speaking, people enjoy public recognition. An effective way to recognize volunteers during the event is for the master of ceremonies to introduce the members of the host

committee and the steering committee and ask them to stand. Many nonprofit organizations will publicly recognize their board members during a special event. If your nonprofit benefits the youth in your community, the audience enjoys seeing these young people involved in the public recognition of volunteers. This can be done in several ways: Young people can read their words of appreciation at the event, they can present the gifts onstage to members of the volunteer event team or their thank-you notes can be printed in the event program.

After the event has been held, volunteers often continue their association with the charity. If they were unacquainted with the organization prior to working on the event, they have been educated about its mission and vision during the event preparations. Volunteers can be effective spokespersons for nonprofit organizations, and their philanthropic support often continues long after the event. Sometimes volunteers for a special event continue to be intensely involved in an organization, eventually becoming candidates for board membership.

### ***Future Leaders***

Special events play an integral part in major-gift fundraising because volunteers and supporters are identified, cultivated, solicited and stewarded during the planning and execution of these events. Special-event volunteers also can bring enthusiasm and vitality to nonprofit organizations, propelling them to a new level.

# Tips for a Great Event ---

**T**he difference between a good event and a SUPER event is all in the details! There are four areas that should receive special attention—the guests, the dinner or luncheon table, the menu and the event check-in.

## *Guests*

If guests feel that they have received special attention and appreciation, they will continue to support the nonprofit organization. One way to make guests feel special is to take pictures of them at the event and print some of the photos in charity publications and on the website. Paid staff and event leaders can give a list of people to photograph to the hired professional photographer. Designated staff members also can take candid shots of guests for the organization's president to include in thank-you letters.

If guests have special needs, such as special dietary needs, wheelchair access, etc., they will greatly appreciate being notified beforehand that their needs will be accommodated at the event.

Also, before and during the event, check the bathrooms for cleanliness and make sure an ample supply of soap and towels is on hand. Having chairs (over to the side) for anyone who might wish to be seated during a cocktail reception is also a good way to care for your guests.

## *Dinner or Luncheon Tables*

An important element in setting the mood for an event is the appearance of the dinner or luncheon tables. Full-length tablecloths always make tables look pretty and are preferable, but if the rental cost exceeds your budget, often you can rent shorter

tablecloths and chair covers for less money and add a touch of class. Clever table decorations can bring smiles to the faces of guests, and they do not have to be expensive to be attractive. If the charity is youth focused, have some of the youth served by the organization make the decorations. These are often the topic of conversation, and centerpieces can be sold to add funds to event proceeds.

Another nice addition to the table is having individual printed menus listing the different courses to be served. If you are providing place cards, computer calligraphy is the way to go to reduce trouble and expense. Guests always appreciate small favors, and some very attractive ideas are available at a low cost. Some merchants will provide guests with “goody bags,” which are especially popular at ladies’ events when the favors are samples of cosmetics and perfume. Foil-covered chocolate mints imprinted with the nonprofit’s logo are another nice touch.

When planning the menu for a special event, select foods that most guests enjoy and be sensitive to religious, cultural and medical issues. Always have a vegetarian selection to offer guests when they inquire. If serving wine, also offer a nonalcoholic beverage. If you know that a guest is diabetic, offer a fruit plate in place of dessert.

### *The Menu*

Organization is vital to a smoothly run event check-in. Guests will appreciate when their check-in is quick and uneventful. For an efficient process, each staff person working the event registration table should have three lists:

### *Event Check-in*

- **an alphabetical listing of guests (last name first) with their table numbers**
- **a listing of each numbered table with the names of the table sponsor and the guests to be seated the table (see Appendix F)**

■ **a listing of the category of the tables (i.e. five-star or four-star) and the guests at each table**

If staff members working the registration have these three lists, they will be able to properly seat any guest whose name does not appear on the alphabetical list (for example, if someone were taking the place of a guest who was unable to attend at the last minute).

Guests also appreciate receiving a table location card that tells them where they are seated.

It is helpful to have a schematic drawing of table locations on an easel near the event registration, and caterers are glad to provide numbered table stanchions so guests can easily find their seats. Wait staff should remove table stanchions once guests are seated so as not to distract from the centerpieces. Event registration and guest seating sometimes can be tricky, so train your staff to handle any problems with diplomacy and grace.

Once you have:

- **reviewed the opportunities resulting from hosting a special event for your organization**
- **assessed your organization's readiness to host an event**
- **written your special event plan**
- **completed your special event timeline**
- **reviewed suggestions for working with event volunteers**
- **considered tips for a great event**

... you are READY to host a super special event! Remember that your organization can bring uniqueness to an event that will make it special. Work hard, be organized and have fun!

# Appendix A

## CHECKLIST FOR PUBLICIZING YOUR EVENT

### PUBLICITY CHECKLIST

#### SIX MONTHS OUT

- Mail save-the-date postcards to everyone on the invitation list.
- Contact the local newspaper or chamber of commerce to publish your event on the community calendar.

#### FIVE MONTHS OUT

- Send out a press release announcing the event and the honoree to the local media and the media in the honoree's hometown.

#### FOUR MONTHS OUT

- Mail event solicitation letters to prospective table buyers.
- Send out a press release announcing the event underwriters and sponsors.

#### THREE MONTHS OUT

- Have street banners made to announce your event and ticket contact information. (In smaller cities, the city hall often will grant permission to hang banners across streets for a fee.)
- Contact local radio and television stations about the possibility of the event chairs appearing on a morning show to publicize the event. Schedule the appearance two weeks prior to the event.

## SIX WEEKS OUT

- Mail auction catalogues to the underwriters, sponsors and people that you especially want to come to the event. This early catalog mailing piques interest in specific auction items, often attracting new table and ticket purchasers to an event.

## FOUR WEEKS OUT

- Contact the local newspaper event reporter to write an article on your upcoming event.
- Hang street banners.

## TWO WEEKS OUT

- The event chairs publicize the event on local radio and television programs.

## WEEK OF THE EVENT

- Solicit the newspaper to send a photographer to cover the fundraiser for the community events/society section.

## WEEK AFTER THE EVENT

- Send out a press release announcing the amount of funds raised and the success of the event. If available, announce the dates for the event next year.

# Appendix B

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## SAMPLE LETTERS FOR DONOR RELEASE AND THANK-YOU/CONFIRMATION

**B**efore publishing donors' names or pictures in event invitations and publications, be sure to secure their permission. The following is a sample of a release form to use.

### *Permission to Use Donor's Name*

I, \_\_\_\_\_ (name of donor), give my permission to \_\_\_\_\_ (name of organization) to print my name in event invitations, programs or event publicity for the \_\_\_\_\_ (name of event), to take place on \_\_\_\_\_ (date of event).

\_\_\_\_\_

Signature of donor

\_\_\_\_\_

Date

Dear Mr. and Mrs. \_\_\_\_\_:

### *Confirmation and Thank-you Letter*

On behalf of \_\_\_\_\_ (name of organization), I want to express our sincere appreciation for your support of our upcoming \_\_\_\_\_ (name of event) to be held on \_\_\_\_\_ (date of event). Thank you for your permission to list your name in the event invitation, program and event-related publicity.

Please contact me at \_\_\_\_\_ (phone number) if you have questions or need further information. We look forward to seeing you on \_\_\_\_\_ (date of event).

Sincerely,

(Your name)

# Appendix C

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## SAMPLE QUID PRO QUO LETTER

**D**ear Mr. and Mrs. \_\_\_\_\_:

Thank you for supporting the Gamma Tabletop Event benefiting the youth programs of Harris County.

Our records indicate that you purchased a \$2,500.00 table in support of this event. The fair market value of the goods and services provided by the Gammas in connection with this event is \$56.70 per person, entitling you to a tax deduction of \$1,933.00 for your gift.

Your generosity and support of this event, combined with your interest, help shape the lives of our youth in their personal and academic endeavors. On behalf of the Gammas, I want to express our sincere appreciation.

Sincerely,

(Name)

President

# Appendix D

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## SAMPLE SPONSORSHIP PROPOSAL

**T**his year's \_\_\_\_\_ (name of event) promises to be the most exciting event ever hosted by \_\_\_\_\_ (name of organization)!

Headlining the event will be \_\_\_\_\_ (name of star athlete), and guests will have the privilege of hearing about the \_\_\_\_\_ (name of athlete's team) win in the World Series as \_\_\_\_\_ (star athlete) is interviewed by world-renowned sportscaster \_\_\_\_\_ (name) on stage during the dinner.

There also will be a VIP reception (for donors giving \$2,500 or more for the event) prior to the seated dinner, and the silent and live auctions featuring sports memorabilia will be highlights of the evening's entertainment.

You (or your corporation) can be one of the top sponsors of this exciting event. Sponsorship details and amenities are listed below. Please contact \_\_\_\_\_ (name of staff member and phone number) for more information.

### **Event Naming Sponsor (\$25,000)**

- ▶ Three top tier tables (10 guests at each table) at the dinner
- ▶ Thirty tickets to the VIP reception (drinks and appetizers included) with \_\_\_\_\_ (star athlete)
- ▶ Listing as naming sponsor in the event invitation
- ▶ Group photo taken during the VIP reception of \_\_\_\_\_ (star athlete) with each of the three naming sponsor tables
- ▶ Banner with your message or logo displayed during the event in the arena
- ▶ Full-page ad in the event program
- ▶ Master of ceremonies will publicly thank you during the dinner as your logo is flashed on the overhead screen

**VIP Reception Sponsor (\$15,000)**

- ▶ Two top tier tables (10 guests at each table) at the event
- ▶ Twenty tickets to the VIP reception with \_\_\_\_\_ (star athlete)
- ▶ Listing as VIP reception sponsor in the event invitation
- ▶ Group photo taken during the VIP reception of \_\_\_\_\_ (star athlete) with each of the naming sponsor tables
- ▶ Banner with your message or logo displayed at the VIP reception
- ▶ Half-page ad in the event program

**Table Sponsor (\$5,000)**

- ▶ One top tier table (10 guests ) at the event
- ▶ Ten tickets to the VIP reception with \_\_\_\_\_ (star athlete)
- ▶ Listing in the event invitation
- ▶ Group photo taken with \_\_\_\_\_ (star athlete) during the VIP reception
- ▶ Quarter-page ad in the event program

**Table Sponsor (\$2,500)**

- ▶ One mid-tier table (10 guests ) at the event
- ▶ Ten tickets to the VIP reception with \_\_\_\_\_ (star athlete)
- ▶ Listing in the event invitation
- ▶ Group photo taken with \_\_\_\_\_ (star athlete) during the VIP reception
- ▶ One-eighth page ad in the event program

**Table Sponsor (\$1,500)**

- ▶ One lower-tier table (10 guests ) at the event
- ▶ Admittance to the general reception in lobby
- ▶ Listing in the event invitation

**Tickets (\$500, \$250 and \$150)**

- ▶ Seating in the lower tier at the event
- ▶ Admittance to the general reception in lobby

# Appendix E

## SAMPLE EVENT RESERVATION FORM

LOGO of Event

Date of Event

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone number \_\_\_\_\_

Email address \_\_\_\_\_

Name as it should appear in program \_\_\_\_\_

Please reserve the following:

\_\_\_\_\_ \$5,000 table      \_\_\_\_\_ \$500 ticket

\_\_\_\_\_ \$2,500 table      \_\_\_\_\_ \$250 ticket

\_\_\_\_\_ \$1,500 table      \_\_\_\_\_ \$150 ticket

**(Table seating is for 10 people. Please list the names of those attending on the reverse.)**

I/We are unable to attend. Please accept our donation \$ \_\_\_\_\_ .

I have enclosed \_\_\_\_\_ for my tickets/table.

Reservations may be made by

check made payable to \_\_\_\_\_ (name of organization), or by

credit card. I authorize you to charge my VISA, MasterCard or American Express card (please circle) for \$ \_\_\_\_\_. My credit card number is \_\_\_\_\_. The expiration date is \_\_\_\_\_.

Please send this form and payment to \_\_\_\_\_ (nonprofit's address).

For event information, please contact \_\_\_\_\_ (phone number) or

email \_\_\_\_\_ (email address).

# Appendix F

## SAMPLE TABLE SEATING FORM

### SEATING FORM AND CHECKLIST

TABLE NO.	TABLE NAME/GUESTS	TABLE TIER	CONFIRMATION SENT
1	<b>John Smith's Store</b> <i>John Smith Sr.</i> <i>Jane Smith</i> <i>Jan Smith</i> <i>Larry Smith</i> <i>Gavin Smith</i> <i>Sue Smith</i> <i>Bert Smith</i> <i>Kay Smith</i> <i>John Smith Jr.</i> <i>Trey Smith</i>	<b>\$5,000</b>	<b>Yes</b>
2	<b>The Kitchen Store</b> <i>Bob Jones</i> <i>Kay Jones</i> <i>Bobby Jones</i> <i>Bert Jones</i> <i>John Jones</i>	<b>\$2,500</b>	<b>No</b>
3	<b>Individual tickets</b> <i>Bobby Smith</i>	<b>\$150</b>	<b>Yes</b>

# Appendix G

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## THE EVENT PLANNER'S FAQs

**Q** How should you notify donors of the amount of their tax deductible donation when they have purchased a ticket or table at a special event?

- A. This can be done when the charitable organization writes the acknowledgement letter thanking donors for the gifts. In your letter, you can state the fair market value of the goods and services provided in connection with the event (the cost of anything the donors have received, such as food, drinks, etc.) and further state that they are entitled to a tax deduction, which is the amount given minus the goods and services provided.

### STAYING CURRENT WITH IRS REGS

*For current changes in tax law dealing with fair market value, quid pro quo and more, please visit [www.irs.gov](http://www.irs.gov) in the Charities and Nonprofits section and/or consult a tax professional.*

*For those outside the United States, please check with the appropriate regulatory agency in your country and/or consult with a tax professional.*

**Q. What is considered quid pro quo?**

- A. The Internal Revenue Service considers a quid pro quo contribution as “a payment a donor makes to a charity partly as a contribution and partly for goods or services.” Nonprofits are required to disclose to the IRS when a quid pro quo contribution of \$75 or more is made. Visit the IRS website, [www.irs.gov](http://www.irs.gov), for more information. For an example of a quid pro quo letter, see Appendix C.

**Q. How many items should you have for a live auction?**

A. Generally four or five items are optimal so you can keep the audience's attention.

**Q. How much should you spend on catering for a special event?**

A. Consider the type of event you are having, the fundraising goal and the overall anticipated expenses for the event. Your event planners will want to strike a balance, hosting a nice function, but nothing too opulent that it makes donors question the extravagance of the nonprofit. Remember to watch the cost per dollar raised.

**Q. What is the rule or law about raffles?**

A. Event planners should check with local and state authorities regarding legalities of raffles. Some states require that you check with the state attorney general's office.

**Q. At an event with assigned dinner table seating, where should you seat guests who have purchased individual tickets?**

A. Individuals should be seated according to the price of the ticket purchased. For example, guests with the same priced tickets would be seated at the same tables in the same area, with the higher priced tickets acquiring the better seats in the room.

**Q. Sometimes table hosts are not able to use all the seats at their tables and want the charity to fill the remaining seats. How should this be handled?**

A. The best way to take care this is to give the table hosts final approval of who will be seated at their tables.

**Q. How do you manage the sale of table decorations or centerpieces during the event?**

A. An easy way to handle this is to place an envelope near the centerpiece with this statement printed on it: “If you wish to purchase this centerpiece, please place \$25 in this envelope and our staff will pick up the envelope at the conclusion of the event. Thank you for your support.”

**Q. What type of gift should you give the honoree?**

A. Talk with the honoree’s family or a close friend to settle on an item that the honoree might enjoy. Ask about the honoree’s hobbies or inquire about areas of special interest to get some ideas.

**Q. How do you set the starting bid for silent auction items?**

A. Most auction items are donated, so you will want to find out their value from the donors. Usually bidding starts at 50 percent of the value, and the auction committee should set bid increments. For example, bidding starts at \$50 with incremental bids of \$5.

**Q. How do you know if your annual special event has become stale? What should you do to revitalize it?**

A. Several indicators signal that an event has become stale—attendance drops off, fundraising totals decline from previous years, recruiting event leadership is difficult and no excitement surrounds the event. To regroup, meet with past event chairs to thank them for their leadership in the past. Enlist their help to plan a brand new event for the next year, recruit an outstanding community leader as event chair and generate excitement around the new signature event for the organization.

# AFP Code of Ethical Principles and Standards of Professional Practice

## STATEMENT OF ETHICAL PRINCIPLES

Adopted 1964; amended October 2004

The Association of Fundraising Professionals (AFP) exists to foster the development and growth of fundraising professionals and the profession, to promote high ethical standards in the fundraising profession and to preserve and enhance philanthropy and volunteerism.

Members of AFP are motivated by an inner drive to improve the quality of life through the causes they serve. They serve the ideal of philanthropy; are committed to the preservation and enhancement of volunteerism; and hold stewardship of these concepts as the overriding principle of their professional life. They recognize their responsibility to ensure that needed resources are vigorously and ethically sought and that the intent of the donor is honestly fulfilled. To these ends, AFP members embrace certain values that they strive to uphold in performing their responsibilities for generating philanthropic support.

### *AFP members aspire to:*

- practice their profession with integrity, honesty, truthfulness and adherence to the absolute obligation to safeguard the public trust;
- act according to the highest standards and visions of their organization, profession and conscience;
- put philanthropic mission above personal gain;
- inspire others through their own sense of dedication and high purpose;
- improve their professional knowledge and skills, so that their performance will better serve others;
- demonstrate concern for the interests and well-being of individuals affected by their actions;
- value the privacy, freedom of choice and interests of all those affected by their actions;
- foster cultural diversity and pluralistic values, and treat all people with dignity and respect;
- affirm, through personal giving, a commitment to philanthropy and its role in society;
- adhere to the spirit as well as the letter of all applicable laws and regulations;
- advocate within their organizations, adherence to all applicable laws and regulations;
- avoid even the appearance of any criminal offense or professional misconduct;
- bring credit to the fundraising profession by their public demeanor;
- encourage colleagues to embrace and practice these ethical principles and standards of professional practice; and
- be aware of the codes of ethics promulgated by other professional organizations that serve philanthropy.

## STANDARDS OF PROFESSIONAL PRACTICE

Furthermore, while striving to act according to the above values, AFP members agree to abide by the AFP Standards of Professional Practice, which are adopted and incorporated into the AFP Code of Ethical Principles. Violation of the Standards may subject the member to disciplinary sanctions, including expulsion, as provided in the AFP Ethics Enforcement Procedures.

### Professional Obligations

1. Members shall not engage in activities that harm the members' organization, clients, or profession.
2. Members shall not engage in activities that conflict with their fiduciary, ethical, and legal obligations to their organizations and their clients.

3. Members shall effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. Members shall not exploit any relationship with a donor, prospect, volunteer, or employee for the benefit of the members or the members' organizations.
5. Members shall comply with all applicable local, state, provincial, and federal civil and criminal laws.
6. Members recognize their individual boundaries of competence and are forthcoming and truthful about their professional experience and qualifications.

#### **Solicitation and Use of Philanthropic Funds**

7. Members shall take care to ensure that all solicitation materials are accurate and correctly reflect their organization's mission and use of solicited funds.
8. Members shall take care to ensure that donors receive informed, accurate, and ethical advice about the value and tax implications of contributions.
9. Members shall take care to ensure that contributions are used in accordance with donors' intentions.
10. Members shall take care to ensure proper stewardship of philanthropic contributions, including timely reports on the use and management of such funds.
11. Members shall obtain explicit consent by donors before altering the conditions of contributions.

#### **Presentation of Information**

12. Members shall not disclose privileged or confidential information to unauthorized parties.
13. Members shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization is the property of that organization and shall not be transferred or utilized except on behalf of that organization.
14. Members shall give donors the opportunity to have their names removed from lists that are sold to, rented to, or exchanged with other organizations.
15. Members shall, when stating fundraising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the American Institute of Certified Public Accountants (AICPA)\* for the type of organization involved. (\* In countries outside of the United States, comparable authority should be utilized.)

#### **Compensation**

16. Members shall not accept compensation that is based on a percentage of contributions; nor shall they accept finder's fees.
17. Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices within the members' own organizations, and are not based on a percentage of contributions.
18. Members shall not pay finder's fees, or commissions or percentage compensation based on contributions, and shall take care to discourage their organizations from making such payments.

Amended October 2004



## THE AUTHOR

*Betsy B. Clardy, CFRE, is the vice president for development and alumni relations at Texas Lutheran University, in Seguin, Texas, serving her alma mater in this capacity since 2001. Prior to that time she served as a regional director of principal gifts for the University of Texas M. D. Anderson Cancer Center in Houston, Texas.*

*For the past 25 years, Betsy has been involved with fundraising efforts benefiting various nonprofit organizations and has experience in all aspects of resource development, from comprehensive campaigns to special events to working with volunteers. Over the years, she has enjoyed conducting workshops at international, national and regional conferences.*

*During her career, she has been active in AFP and enjoys volunteering with various nonprofits.*

# A Donor Bill of Rights

**PHILANTHROPY** is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

## I.

*To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.*

## II.

*To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgement in its stewardship responsibilities.*

## III.

*To have access to the organization's most recent financial statements.*

## IV.

*To be assured their gifts will be used for the purposes for which they were given.*

## V.

*To receive appropriate acknowledgement and recognition.*

## VI.

*To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.*

## VII.

*To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.*

## VIII.

*To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.*

## IX.

*To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*

## X.

*To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.*

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