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Fundraising Fundamentals



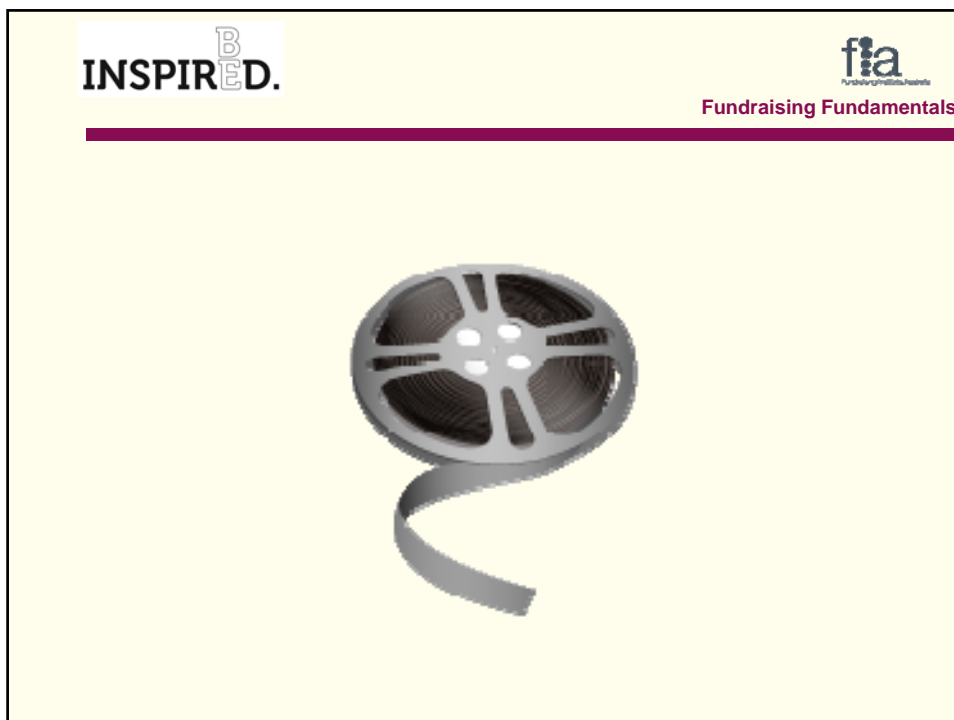
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### The 5 key areas of an event

- Planning
- Sponsorship
- Marketing
- Risk Management
- Evaluation/Debrief



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## **Planning & Structure for Events**

**Do: Plan, Plan, Plan, Plan, and plan some more for events**  
**Don't forget to Plan, Plan, Plan, Plan, for events**


- What does that mean: if you get hit by a bus, anyone in your team/office can take off where you left the event and manage it.

## Planning & Structure for Events

Crucial documents you need for planning an event:

- Event Brief
  - Budget
  - Timeline
- Budget is a must with any event you hold. You need to get sign off from all relevant parties in your organisation – especially the Board & CEO!

## Examples of key documents...



**EVENT BRIEF**

CLIENT:	DGM
CONTACT:	03 9876 5432
EVENT NAME:	DGM Gala Dinner
EVENT DATE & TIME:	14 May 2011, 7pm - 12am
EVENT TYPE:	Fundraising Gala Dinner
VENUE:	The Regent Plaza Ball Room 191 Collins St Melbourne
AUDIENCE:	High Net worth individuals 30 - 50 years of age
ESTIMATED FAX:	400 - 500
OBJECTIVES FOR EVENT:	Raise Funds and awareness of Engage a new target Audience
ANY BRAND GUIDELINES/mandatory Inclusions:	TEC
THEME:	Love Never Dies/Phantom of The music will open at the R following the Ball
DELIVERABLES REQUIRED:	\$400,000 Revenue

DGM GALA DINNER				14
May 2011 (Budget) DRAFT				
Income	Numbers	Cost	Total	
Paying Guests	400	\$400	\$	160,000.00
Scope Complimentary Tickets	100	\$0	\$	-
Sponsorship	1	\$55,000	\$	85,000.00
<b>Total Number Tickets</b>	<b>700</b>			

Category	Item	Quantity	Unit Cost	Total Cost	Start	End
Expenses	Venue - Plaza B	1	150,000	150,000		
	Food - based on					
	Corkage					
	alternate entire					
	technical pack					
	Band food pack					
	Security					
	Bump In					
	Bump out					
	Entertainment	MC				
Band						
Celebrity entertainment						
Audio & Production						
Production - Bar						

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## Sponsorship

- **Do: work hard to obtain sponsorship**
- **Don't: underestimate the value of your brand**
- Define what you want sponsored for this event.
- Have a clear sponsorship document – be creative!
- Cash is always God and in-kind sponsorship is Jesus
- Sponsors are always looking at how to sell their product or service to prospective clients
- Value your brand and do not under sell it.

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## Sponsorship

American Society of Association 2010

- 28,000 Marketing, Advertising and Sponsorship Managers surveyed across the world, Australia included.
- 47% of those surveyed said they would sponsor a live event as it is the best way to get their product or service in front of people.
- Sponsorship is a commercial agreement between two parties, designed for both parties to benefit...or is it...
- Really a sponsorship is:
  - 3 WINS – Sponsor / NFP / Members, delegates, guests etc

## Sponsorship

- There are 600,000 NFP's in Australia, why would a sponsor want to sponsor your event?
- Sponsorship Table – what is the ask you are making?
  - Eg: HEAT Lunch
- What is the strategy of how you will get sponsorship, have you discussed it with your team (that is if you have a team!)
- When are you approaching a corporate for sponsorship – is it the right time of year?
- Define what your brand and event can give to a sponsor – do not undervalue your brand

## Marketing

- **Do: Make marketing a part of your event plan.**
- **Don't: Underestimate the value of a marketing plan**
- Marketing is crucial to any event...what does that mean:
  - Invites etc
  - Communication time line (very important...let's discuss)
  - Media plan: Do you need a publicist for this event?
  - E-marketing strategy
  - Contacts/networks
  - Last resort... buy a list (if you have too!!)

## Communication Timeline Example

"See the Person Campaign" Timeline  
May 17-22 2010

Activity	Due Date	Notes	Responsible
<b>1. Campaign Communication</b>			
1.1 Introductory Letter/Brochure	8 <sup>th</sup> Feb 2010	Web online registration needs to be up and running (we need 2 weeks between sending the letter and early bird registration)	LJ – Printing EL/KL – mail out
1.2 Second Communication – EMAIL Blast	Tues 2 March	Email – reminder email to get schools to register for Early Bird.	TBC – Email (EL or GC?)
1.2 (a) Letter Mail Merge for Early Bird Registrations	Weds 3 March	Following the emails that bounce back, we will send out a reminder letter to encourage schools to register before Early Bird registrations close	L – set up template for email GC – Bounce back List KL/NB/LL – Print KL – Mail merge CB – Mail out
1.3 Early Bird Closes	5 <sup>th</sup> March 2010	Email direct to EL via fundraising team.	
1.4 Final Call to action – Postcard	14 <sup>th</sup> April 2010	Postcard to encourage schools to get involved in the "See the Person" Week.	LJ – design and print post card KL/NB – Labels EL/CB – Mail out
1.5 Registrations Close – EMAIL	21 <sup>st</sup> April 2010	Email to Schools to register before registrations close on the 23 April.	TBC – Email EL – text for email
1.5 (a) Registration Close – LETTER		Send Letter out to schools on email bounce back list	KL – Mail merge EL/CB – Mail Out
1.6 Post Registration follow up – EMAIL Blast * Email to congratulate the schools that have registered and give them some tips for other fundraising activities they may want to hold during the "See the Person" Week	Tuesday 27 <sup>th</sup> April	This email goes to all schools that have registered including early bird registrations.  This email will include information on the schools kit, when they will receive it and what it includes etc.	EL/PE – write text copy TBC – Email KL/NB- Database

## Marketing – Social Media

- **Do:**
  - Build up your network/following
  - Keep content exciting
  - Link all forms of social media together
  - Run special offers and competitions
  - Set a social media strategy




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## Marketing – Social Media

- **Don't:**
  - Be half hearted about it
  - Post stuff without thinking about it
  - Try too much too fast
  - Stray from your organisations ideologies and branding
  - Forget to thank people for helping promote your social media campaign




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## Marketing – Social Media

- Cash for quotes on social pages (sponsorship)
  - eg: Obama, Libya, Iran & Christchurch earthquakes – keeping us all informed and active...oh and lets not forget St.Kilda (not great publicity)!
  - Don't be afraid to use expert advice...

DGM Advertising : [www.dgmcollective.com.au](http://www.dgmcollective.com.au) : 9416 8055

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## Risk Management

- **Do:** Have a comprehensive risk management plan
- **Don't:** NOT have INSURANCE or a contingency plan/s for things going wrong,

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## Risk Management Tips from Beaspoke

- Occupational Health and Safety
- All events must have a risk assessment compiled
- All contractors must provide a Job Safety Analysis (or risk assessment) for their scope of work for the event.
- Insurance documentation –
  - Public Liability (\$10m minimum NB many venues now ask for \$20m from event managers / companies)
  - Workcover certificates
  - Professional Indemnity Insurance
  - Never assume, and if you don't know or are unsure on something, ask an expert

[www.beaspokesafety.com.au](http://www.beaspokesafety.com.au) / or call Bea on 9016 3547






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## Evaluation and Debrief

- **Do: conduct a survey with your guests after the event**
- **Don't: take the feedback personally!**
  
- Feedback is essential to grow events especially to improve it and grow the ROI. Yearly events and campaigns should do this regularly especially if they need to keep the project/campaign alive and sustainable in the market
  
- Post event report also is a crucial element in the closing of any event. It may be a page or 10 page document. It is great to get feedback of what worked and what areas need improvement.




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## Remember the 5 DO's and DON'TS

1. PLAN, PLAN and PLAN!
2. Work hard to obtain sponsorship and don't underestimate the value of your brand.
3. Make marketing a key part of your event
4. Have a comprehensive risk management plan and remember to always have insurance and a contingency plan/s for things going wrong.
5. Conduct a survey with your guests after the event and don't take feedback personally.

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