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IT'S NOT MAGIC! : Planning is the key to successful fund-raising events

By Shirley Tillett

What's the secret for fund-raising event success? It's not a magic spell, but a simple ten-step program.

The "thought equity" you put into planning will take about 75 per cent of the time needed to develop a bright idea for an exciting event into a success. When the business plan for the event is set, you move on to further action.

Step 1. Mission Statement. Whether the need is to raise funds, educate members, showcase products and services, or raise awareness of the organization and its cause, the first step is the same. Planning begins in the boardroom, with a professional coordinator and a knowledgeable organizing committee who share a vision. Start the teamwork with a review of the organization's mission statement, to get direction and purpose.

Step 2. Decide key results. State your goals in general terms, and list objectives much more specifically. Make sure that the objectives are realistic, achievable, and measurable, and that they correspond with economic realities.

Step 3. Develop a "critical path". This tool is the sequence of steps and time lines that help you and your team monitor all activities and ensure that deadlines will be met.

Step 4. Set policies and procedures. Include the administration policies and procedures in your plan, and how each minute detail will be identified, addressed, handled, and monitored.

Step 5. Define responsibilities. Who will ensure the ultimate success of the event? Create an organizational chart, which indicates the leadership and management personnel involved. It includes the reporting structure for committee, staff and volunteers. Develop "roles and responsibilities" profiles for each person shown on the chart.

Step 6. Identify logistics. Begin program development for your event by identifying the logistics such as venue selection, food and beverages, entertainment, accommodations, facilitators, security needs, and so on.

Step 7. Plan the finances. This is the most crucial step. Stakeholders – partners, sponsors, donors, financial institutions, participants, and volunteers – need assurance. They need confidence that financial projections are monitored daily and that positive reaction is made to ensuing changes.

Step 8. Set a contingency plan. This plan is the alternative arrangement to be used in the event that projections or plans are not met for any reason.

Step 9. Develop a marketing plan. With the event program and budget now set, work out a marketing plan. This plan outlines the advertising and public relations strategies that the team will use to target its market.

Step 10. Plan for evaluation. Decide on the evaluation methods to be used in assessing the event's success. Communicating evaluation plans to stakeholders builds their confidence in your organization. Objective evaluation will show what changes should be made to make future similar programs more successful.

In taking the time to do solid planning, your team sets a clear direction and accountability process for itself. Your plan sells not only your event, but also your organization as a quality institution.

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