



# Event Planning Can Be Easier If You Follow These Steps

Here are tips to make sure your event is not only special but successful.

By Jodi Wolf

Historically, fundraising events have been an integral part of a nonprofit organization's outreach effort. In addition to enhancing revenues, they help increase awareness, build credibility, reaffirm the commitment of current donors, and expand the donor base. But not all events accomplish what they set out to do. The key is to identify objectives, plan wisely, and budget effectively. Here are guidelines to help make your next event a winner.

## What Are the Steps to Success?

**Step One: Determine the Five Ws.** Journalists are schooled to answer the five "Ws"—who, what, when, where, why, and sometimes how—in the opening paragraph of their stories. You should regard special events the same way. Before fleshing out a plan, determine the basics: Who will attend? What type of event should be produced for this audience? When is best to schedule the event? Where should it be held? What is the available and approved budget? Your responses to these questions will reveal

your event's tone, tempo, and design. You can discover additional goals by asking: Is your target audience predominantly male or female? How well do they know each other? How many do you think will attend? Even at this stage, have an idea of the maximum amount you can spend to make your event profitable. Begin the creative process by assembling a photo file filled with images from magazines, color swatches, venue brochures, and florists.

**Step Two: Take Care of the Nuts and Bolts.** Next, select a date and confirm a location. Check your city's social calendar to avoid picking a date that falls on a holiday or conflicts with other major events. Do a cost comparison on your ideal location, confirm what the contract includes, then make a decision and reserve the space. Be conscious of your site's accessibility to guests and vendors who are providing the catering, flowers, and other items. Get to know your contact people well, and they'll bend over backwards to help you.

**Step Three: Create a Project Blueprint.** The best way to organize is to build an event book. Prepare an empty binder with page separators, tabs, and a built-in pocket. Create sections for contracts, correspondence, budget and expenses, food and beverage, insurance, talent, venue, floor plans, guest lists, sound and lighting, seating plans, transportation, miscellaneous notes, and your list of contacts. Prepare a timeline, working backwards from

the date of the event. Then research vendors, and request proposals with a detailed budget of their services. If you're lucky enough to have name talent, be sure to include the technical equipment's production costs as a line item in your budget. Thoroughly review vendors' contracts before signing them, and know in advance what overtime costs you'll incur if you decide to extend the time of the event. Add a 10% contingency to your budget to accommodate unexpected additions.

Every event needs to address security.

**Step Four: Envision Your Event.** As you develop the plan, you'll make decisions about the food and entertainment. With regard to food, remember that presentation is as important as taste. If you forgo sit-down service and opt for food stations, they should be abundantly overflowing and constantly replenished. Schedule entertainment to create short bursts of excitement, adding spontaneity to the flow of the evening.

**Step Five: Make It Special.** Come up with some unexpected touches that will create a lasting memory. For a circus, for example, use acrobats and contortionists instead of clowns. At a more formal affair, present each course as artwork, with creative thought toward the type of flatware used and its harmony with the menu. Other memorable options include a unique invitation, creative use of flowers, custom linens, environmental lighting, and abundantly draped fabric. Extras

Any event can and usually does present unforeseen challenges that can result in additional charges.

such as valet parking will augment guests' experience. When choosing giveaways, go for one big item rather than several small, inconsequential ones.

**Step Six: Finish with the Unseen Details.** You need a good staffing and security plan. Such a plan is the glue that holds the event together. Coordinate the efforts of your staff (paid and volunteer) and vendors with the venue contact person. Include details such as when vendors arrive, where and how they unload their equipment, where they set up, and how they manage all aspects of the event. You should also address how and when they will tear down and load up to avoid costly surprises. Effective communication on-site is critical. All staff should be fluent in how to operate your communications system (such as walkie-talkies and headsets) and how to contact those responsible for emergency support. Every event needs to address security, even if it just includes hiring an off-duty police officer, working with the hotel's security team, or having a list of emergency phone numbers.

**Step Seven: Follow Up.** Any event can and usually does present unforeseen challenges that can result in additional charges. Review and confirm them a day or two after the event while the details are still fresh in everyone's mind. Write and mail (don't e-mail) thank-you notes to your vendors, staff, and volunteers. If your event is an annual affair, prepare a post-event evaluation that reviews all areas for improvement.

### Should You Hire a Professional Planner?

Producing a successful event requires a large commitment. How do you decide if you should outsource the responsibilities? Here are some questions to help you determine whether a professional event planner is a good investment:

**Does your staff have the time to manage an event?** The staff time of most nonprofits is usually already stretched. If your people lack experience producing events, you have a further complication. How would they organize their workflow, and establish and manage the budget? Would they know how to define and maintain the timing issues connected to delivery, set-up, and teardown? These are just a few of the many details needed to pull an event together.

**Does your staff have the creativity needed to make the event successful?** If you need to pump new life into an annual program—or even if you just want some new ideas—can your own staff answer that challenge? The value of using event experts is that they'll suggest options you might never have considered.

**Has your staff had experience with big-name entertainment?** Using celebrity talent is an excellent way to

*continued on page 8*



**INSURANCE**

AVAILABLE IN ALL 50 STATES

- Adoption & Foster Care Placement Centers
- Substance Abuse Centers
- Mental Health Counseling Centers
- Residential Care Facilities
- Domestic Violence Shelters
- Developmentally Disabled Programs

and more!

Have your Insurance Agent Call  
**1.800.275.6472**  
www.RPSins.com/NIPC

Providing Coverage for Social Service Agencies Since 1976.

**RPS NIPC**

PO Box 834  
Poulsbo WA  
98370



**WHAT'S UP ONLINE?**

To broaden online discussions on nonprofit topics, we're expanding our Discussion Forum with a ListServe, provided by Yahoo Groups. To join, you can either click on the "Yahoo" button at:  
<http://www.snpo.org/social/>  
(free Yahoo login required)  
or send a blank e-mail to:  
[snpo-subscribe@yahoogroups.com](mailto:snpo-subscribe@yahoogroups.com)

If you have any questions, contact Jason Chmura at [jchmura@snpo.org](mailto:jchmura@snpo.org).

# Creative Fundraising Ideas

## Innovate with a Breakfast Gala

To stand out from the pack, consider holding a breakfast gala rather than an evening event. The Capital Breast Cancer Center in Washington, D.C., brings in \$100,000 a year with its annual breakfast extravaganza. Attendees like the fact that it's guaranteed to last exactly one hour. This short time period also makes it easier to plan and to keep people's attention during the event.

## Include Children

If you want to assure attendance at your special event, make children part of your program. Parents never miss a chance to see their little ones take the limelight. If you involve kids in some capacity, their parents are bound to attend. For more creative fundraising ideas, see "Special Events Galore!" ([www.stevensoninc.com](http://www.stevensoninc.com)).

## Offer Personalized Calendars

An innovative new Web site, [www.calendarlink.org](http://www.calendarlink.org), lets you invite your supporters to personalize and purchase customized calendars. From the \$19.95 purchase price, \$10 goes to your organization. There are no sign-up fees or costs involved for your organization. The idea came from San Diego entrepreneur John Conover, known for his Tidelines' calendars, which feature ocean photography personalized with photos of people's families, friends, surf trips, and other vacations. ■



Know in advance what overtime costs you'll incur.

increase pre-event visibility while adding a bit of magic at an event. When negotiating with talent to perform, there is unfortunately only one set of rules—theirs! Some booking agents won't even take your call if they don't know you. Once the artist is secured, hiring a production company to secure the sound and lighting equipment required by the performance contract is a must.

When choosing giveaways, go for one big item rather than several small, inconsequential ones.

**Does your staff know how to deal with security issues?** Post 9-11, all events demand thoughtful security consideration. If high-level dignitaries will be present, you'll probably need to work with bodyguards or the Secret Service.

**What should you look for in a planner?** If you're ready to hire an event professional, identify one with insight into the culture of your audience. The company you hire should have managed events similar in size and scope to your upcoming event. For best results, don't wait too long to begin the process of choosing your event partner. A major event usually takes a year to plan. You can lose buying power with vendors if

you fail to lock up dates early on.

**Are there times when you shouldn't outsource?** If the cost of producing the event may prevent you from reaching your fundraising goals, then you shouldn't outsource. A reputable event professional should be able to eyeball your budget and provide the information you need to make a wise, informed decision. ■

*Jodi Wolf is president of Paulette Wolf Events & Entertainment (773-475-4300, [www.pwe-e.com](http://www.pwe-e.com)), a Chicago-based event management company which specializes in producing complex events nationwide for nonprofit organizations such as Northwestern Memorial Hospital and the Art Institute of Chicago.*

## RESOURCES

Harrison, Bill, "Are Special Events Lost in the Land of Oz?" *Nonprofit World*, Vol. 13, No. 4.

"How a Special Event Can Raise Your Visibility," *Nonprofit World*, Vol. 13, No. 6.

Major, Mimi, "Taming the Beast: Four Keys to that Special Event," *Nonprofit World*, Vol. 20, No. 4.

These resources are available at [www.snpo.org/members](http://www.snpo.org/members). Also see Learning Institute programs online: Resource Development and O for Opportunity: Exploring New Revenue Opportunities for Nonprofits (<http://www.snpo.org/lin>).