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We all know Bob Dylan’s famous song “The times they are a changin’” and many a verse from it are so appropriate to the non-profit sector today as we are faced with new challenges, new budgets, new technologies, and a new generation of donors to seduce.

His lyrics give some thoughtful advice, “If your time to you is worth savin’, then you better start swimmin’ or you’ll sink like a stone.” Non-profits have such little time and few resources to pull together events that they often feel confused and panicked at the onset of planning a fundraising event. Many tend to look at their competitors to see what events they’ve done and then try to replicate them. It’s not that people are less interested in fundraising events these days, but participants become disinterested when events all start to look the same. When you can’t tell one organization from another, there is less unique value and more brand confusion. It’s time to take a more strategic approach in your events, one that sets you apart from the pack.

The Opportunity:

Grow Your Fundraising Program

Events can be a great source of revenue and fundraising opportunity for charities. Ticket prices are the obvious source, but add to that the potential for raffles, auctions, door prizes, on-site event donations, and VIP opportunities, there are many ways to engage participants.

Beyond raising funds, events — when done well — help raise awareness for your cause. While the monetary measurement of success is easy to measure, measuring brand awareness is not. Online tools such as social media and alert monitoring allow us to monitor what the public is saying about our brand leading up to, or after attending an event, so it’s important to keep an eye out on the ripple effect your events may have beyond the event itself.

Although noble, the daily activity at a non-profit is not usually newsworthy, but events tend to attract more media attention, particularly ones that are unique with high profile spokespeople or a special anniversary to celebrate.

As charities focus more on creating relationships with their stakeholders and attracting new potential donors, there is no better opportunity to build face-to-face time with supporters than at your events.



The Challenges:

Knowing the Pitfalls is Half the Battle

Events are not without their challenges but we know that with great challenges come great rewards. Here's an honest look at just some of the things that can go wrong — but don't get scared away — this white paper is designed to ensure you mitigate them all.

With the growing number of fundraisers these days, it's getting harder and harder to obtain favours and gifts in kind for events. There can be upfront costs for venue, food, staffing and insurance just to name a few.

Turnout is likely the most terrifying aspect of planning an event. Weather and outside factors can have a huge influence on the success and there is also the risk that people will buy a ticket to support your organization but won't show.

If you have an inexperienced staff or committee who have never organized an event before, that adds an element of risk requiring a very clear plan to ensure their efforts lead to strong results.

One misstep in logistics can be devastating at an event. The larger the event the more things to consider about safety, staffing, ticket selling, issuing tax receipts, coordinating volunteers and more.

Communications are also challenging because you have to figure out the best way to reach specific target audiences who will care about your cause and who can help spread the word. With so many competing activities today, having strong marketing tools both online and off are directly linked to the outcome of your event.



Events versus Peer-to-Peer Social Fundraising:



Let's Make Sure We're On the Same Page

When considering whether to run a peer-to-peer (P2P) fundraiser or a more traditional fundraising event, consider your target demographic. Young professionals are the largest group interested in running and participating in peer-to-peer activities, followed by middle aged adults and college students.

While many P2Ps have actual location events, they differ from the type of events we cover here. When we refer to events in this white paper, we are referring to events that are organized and hosted by the charity. In P2P events, your supporters are fundraising for you through personal fundraising pages, events, challenges, or activities.

There are many benefits of P2P fundraisers:



Leverage existing relationships to increase your brand's visibility



Use your supporters to raise money for you



Scalable with many options to choose from



Develop a broader reach than traditional fundraising efforts



Appeals to a younger demographic



You can learn more about P2P in [THIS WHITE PAPER.](#)

Traditional events are usually a less risky way to start, but it really depends on your objectives and your target audience. For example, if you have a younger active and highly engaged supporter base, a P2P fundraising event may be your better choice. Reading both white papers will help you decide.

While you may not want to launch your first event and P2P in the same year, many charities manage to succeed having a healthy mix of both organization-run events, and P2P supported initiatives. Keeping a diverse mix of activities in your fundraising program is a healthy way to grow your revenue.

Event Ideas

We've all heard of, or been to, the traditional fundraising events: galas, golf tournaments, auctions, concerts, plays, dinner events, themed cocktail parties, runs, walks and all the other "a-thons" you can think of.

Differentiation is key to creating a satisfying and memorable experience for your guests and participants.

The most successful events, and those with the strongest growth potential, have a clear and distinctive positioning based on emotional as well as rational benefits. Make sure your choice of event is in line with your organization's core values and is in sync with fundraising goals.

Here are a few other options you may want to consider when exploring the types of events to host:



An educational speakers conference
(for inquiring minds)



Garage sales
(for the entrepreneurial purging type)



Paint night
(for the artistically adventurous)



Dance-a-thon or roller skating marathon
(for the retro seekers)



Cooking workshop
(for the curious culinary)



Do good chores
(for those who want to roll up their sleeves)



Game show themed party
(for the playful know-it-alls)



Games night
(for board game enthusiasts)



Battle of the bands
(for the Dylan in all of us)



Dares and stunts
(for the insanely brave)

Plan a **brainstorming session** to explore ideas and open it up to a wider group than just your staff or event committee. Consider including a sponsor, potential partners, past participants, or volunteers for both an insider and outsider's view.

Your choice of event theme should be based on the following:

- 1 Your target audience
- 2 Your organization's mission
- 3 Your fundraising goals for this particular event
- 4 Your staff and volunteer resources
- 5 Your sponsors
- 6 How this event fits in with your other activities
- 7 What your competition is up to
- 8 Your ability to reproduce the event for multiple years while maintaining audience interest.



TIP: Brainstorming can be a lot of fun. Start by reserving the first part of the meeting where every idea is a good one. Keep the “no” and “negativity” out of the room and get creative. You can hone in on ideas that fit your comfort level later one.



Creating an experience — must haves



Identify your **audience**. If you don't know who you are talking to, how do you know what to say? Your target audience should be large enough to grow your following, but small enough to make everyone feel included in a specialized and segmented way. Organizations need to adapt their events and communications to donor behaviour. This makes for a more relevant experience and stronger results.

Define your **brand promise**. When you know what you stand for, it's easier for people to stand by you and stand up for you. Stronger connections with your constituents and prospects leads to more participation, increased donations and advocacy. Review your mission, vision and values on a regular basis and make sure you live by them.

Share your **impact**. A simple “thank you for attending our event” will not get participants to participate the next time around. Tell them how their time and dollars made a difference and share stories of the people who benefitted from the event. Keep it real and have accurate numbers to support your results.

Show **appreciation**. Give a shout out to the community when they've come out to support you and find unique ways to say 'Thank You'. Celebrate team leaders and ambassadors who have rallied on your behalf, and don't overlook committee members, spokespeople, staff and volunteers who helped it all come together. A little goes a long way to foster stronger bonds with those who care about your cause.

Budget:

Right-sizing your event

The number one piece of advice for planning a successful event is to plan according to your available resources. If you aim too high with your fundraising goal or choice of event, your organization will be frustrated, tired and feeling like a failure.



Things to take into account when determining your budget:

- The size of your market: are you local, regional, national?
- The size of your target groups.
- What stage are you at: launch, maturity, decline?
- Is this a repeat event or a new activity?
- The projected revenue: what do you expect this event to cost? How much will you raise?
- How much are you willing to invest to acquire a new donor?

Once you've delved into these details it's time to take a pause. Do you think this is the event your target audience will value? If you think so, and if you haven't already, it's time to consult some of your core supporters and get their input and ideally their commitment to participate and help ensure the event succeeds.

Sponsors:

Getting a helping hand

What if I don't have a sponsor? Smaller charities in particular often ask, "Do I have to have a sponsor?" Absolutely not! There have been countless successful charitable events with no sponsor involvement, and, by all means, if you are weeks away from your event, you're probably best to park the sponsorship idea until next year. If you have even a bit of time however, recruiting sponsors can be a great use of time. As a general rule of thumb, the less time you have before your event to invest in sponsorship planning and engagement, the better it is to keep your ask of sponsors small and over deliver on the benefits and experience to the sponsor. You can always work towards a larger commitment next year.

Sponsors are a huge help to events, no matter what the size. Sponsorships can be as small as a music school lending you the entertainment system for your event, a marketing firm designing and printing your signage, or local stores providing silent auction items or door prizes. They can also be large, for example a major brand covering large expenses and offering its resources to help in planning, promotion and execution. Here we focus on the benefits and steps to securing a marquee sponsor but you can easily claw back based on your capacity and needs.

Getting Started: It's important to determine what companies could gain from sponsoring your event. While you are a charity and companies are keen to demonstrate corporate social responsibility, they are still approaching this as a business deal, and so should you. Obviously, ideal sponsors are ones that care about your event's audience and should never be in conflict of interest with your cause. It's also important that you know who your event attendees are and properly relay this to the sponsor, explaining the clear benefit in connecting them to that specific market.



Begin by **researching** a company's brand promise. You can usually find this on their website or social media channels. Seek out the types of events a company has sponsored in the past. This may seem like more work, but it's time well spent if it connects you to a loyal sponsor.



Always remember to present the **benefits** of the alliance from a sponsor's point of view. Companies want to know what the company gains by supporting your event. As a charity, you have the benefit of playing up the emotional side of things. Even though you are dealing with executives, they are human after all. Use it!



Sponsors love **data**. Prepare demographics and other important facts for them to review. If a company is considering a financial investment, they will need full details as with any other business transaction so show up ready with a specific ask, the details on how the money will be used, and how their participation will have a direct impact on your charity reaching its goals.



Sponsors also love marketing **strategy**. Briefly explain your game plan and provide any visuals you can about the event's theme, how the event will look and the image of your promotional marketing materials. Show them you are taking every aspect of the event seriously and stay one step ahead of their questions.



Explain how you will **promote** the event. Include details about how they will be showcased before, during and after the event. Offer to link your sponsor's existing marketing campaign to your event if possible. The better the connection, the more alluring your event will be to a sponsor.



Focus on **relationships**. Potential sponsors want to feel included in a social movement, not just part of a pitch. Find ways to explain that your organization and the event are a good match for their business goals. By looking out for their needs, you'll have them looking out for yours.



Always **follow up**. Sponsors are seduced day in and day out. Your proposal may be sitting on someone's desk amongst many others. Explore ways to stay top of mind without being a nag. Use personal contacts whenever possible to make a stronger, more natural connection between the company you are soliciting and your cause.



Take care of your sponsors. If you extend an invitation to the company to attend the event, make sure someone on your team is there to greet them and introduce them to board members, spokespeople or beneficiaries. The latter is especially good for the emotional connection they will make with your organization which will encourage continued support in years to come.



Document the visibility. Take photos of the stage, the event banners or other marketing tools that bear the company's logo. Record a short video of the emcee thanking all the sponsors to send via email after the event to show they were properly and publicly thanked. Make it part of your event plan (meaning be sure to assign this task to a staff member or volunteer) to make sure this is not overlooked as this is an important step in retaining generous sponsors.



Measure and analyse. Plan a review of the event after it is over. Find out what worked well and what could be improved from the sponsor's point of view. Send a note thanking sponsors for their participation, provide stats on attendance/results and invite them to attend/sponsor next year's event. They will feel more included in the success of the event if they are asked to provide input and they will appreciate your thoughtful approach and professionalism, which will help to keep them on board for future events.



Asking for prizes

When asking for prizes, make sure that the ask is reasonable for the company. You can even play off of several potential partners explaining that you have made this offer to only a select few and they should take advantage of the opportunity to grab it before their competitor does. A little healthy competition never hurts!



Covering costs

Events usually have one goal in mind: raise money. In order to do that successfully, you must not only avoid losses, but create “profit” so that money in turn can be invested in your programs and services. A good way to ensure the safety of your event is to calculate all the **hard costs** of your event and approach a main sponsor to cover those costs. These sponsors are often referred to as Title Sponsors or Leading Sponsors.

Draw up a clear shopping list of what you need to spend money on to make the event happen, then make the ask. Demonstrate that you have done your homework. Show that you have sourced and negotiated the best possible prices in order to keep your costs down. While many sponsors want to know what they will receive in visibility, many are just as concerned with the viability of the event and want to be reassured that your organization is a safe bet. They do not appreciate getting asked for more money if things are not properly budgeted, so make sure to know how much you really need.

Hypothetically, let’s say you need \$20,000 to cover the costs and the event has a potential revenue of \$50,000. Without the sponsorship, you would only net \$30,000 which would limit your impact and would not be as worthwhile considering the effort involved in hosting such an activity. When calculating your costs, don’t forget to add the **cost of salaries** for your employees who will be dedicating time to the event in addition to their regular duties.

Remember that sponsors want to see you are taking a **sound business approach** to your event. They will have greater respect for you and a higher chance of saying yes if you present a solid business plan.

Offering value to sponsors

Before talking to sponsors, learn the **lingo**. For example, “Reach” is a term generally used when planning advertising campaigns. Reach is the number of people you touch with your marketing message or the number of people that are exposed to your message. No matter what size of event you are hosting, you are able to offer sponsors one thing they always long for: greater reach. If your event is small and intimate, you are attracting a very targeted, loyal group. If your event is large scale with a high number of participants, that means more visibility. Either way, you can spin things in your favour if you know how to talk to sponsors on their level. Consider asking a committee or staff member who understands marketing to help the executive team make the ask.

Your event also offers **brand affinity**. Brand affinity is the most valuable level of customer relationship based on the mutual belief that the customer and the company share common values. It breeds unshakable trust in the relationship. We know that people want to purchase from companies that give back to the community. If you change lives in a positive way, that’s called cause-related marketing and companies today are scrambling to get it right. Demonstrate that your event is their answer to cause-related marketing and you’ll have them eating out of the palm of your hand!

Promise **deliverables**, not just media coverage. Be as specific as possible, for example, “We will give you coverage in the [name of publication here]. It has a circulation of [x thousands] people making more than [insert income amount here] a year.” If you are offering visibility through your social media channels, be specific about the number of followers you have and the level of engagement your posts receive.

Other things you may consider offering are **naming rights**. You may offer overall naming rights to the event, but be careful this does not distract from your mission. You may also offer naming rights to a physical section, area or group, or naming rights for an event-based award or trophy.

If you are considering **product placement** or official product status, be sure that you have vetted the products and that there is no conflict of interest (ex: risky energy drinks offered at an event aimed to raise awareness about healthy habits for youth — not a good mix!)

More options include¹:

- 1 Exclusivity among sponsors at a given level
- 2 Input into choice of venue, route, or timing
- 3 Choice of sponsor venue for launch, main event, or supporting event
- 4 On-site product sampling opportunities
- 5 Demonstration or display opportunities
- 6 Event signage, exclusive, or non-exclusive
- 7 Banners or ads on the event website
- 8 Signage on buildings, structures, vehicles, competitor uniforms, event staff
- 9 Hospitality – tickets to the event, tickets to corporate boxes, reserved seating, etc.
- 10 Introductions to celebrities ('talent')
- 11 Customized hospitality event to suit the sponsor's VIP audience
- 12 Internet-related benefits such as content for the sponsor website
- 13 Early access to tickets for their customers before public sales
- 14 Opportunity to provide inserts to event-based mail outs
- 15 Participation in the event by employees, shareholders
- 16 Establishment of staff volunteer program
- 17 Specially designed new event to suit sponsor
- 18 Coupons or advertising on the reverse side of tickets
- 19 Coupon redemption opportunities
- 20 Opportunity to provide gifts in kind – free equipment, services, technology or staff as part of the value offered in the sponsorship deal

¹Source: http://www.cuttingedgepr.com/articles/sponsorship_many_benefits.asp

Who and how to contact sponsors

A personal contact is always best but if you have to cold call, be sure to go to the right department. Do your homework first. If the company does not have a social responsibility director, ask for the marketing department. You may have to get creative about how to get by the gatekeeper or receptionist in order to get to the decision maker. Consider using **LinkedIn** once you've identified who's in charge. See who you know who could introduce you. Six degrees of separation is a fascinating theory, use it!

Always start with a **phone call** to introduce yourself. Have your talking points ready so you can ask for what you want, but don't take up a lot of a potential sponsors' time doing it. Ask how they would like you to follow up (by email or by mailing a printed package). Also ask how much time they need to review your project. Get them to commit to a time frame and call or write back at that time to show you're keen. If they direct you to an online form, don't waste your time. There's very little chance they actually review the submissions and the form is likely a smoke screen to make the company look good for doing very little social good.



Sales and marketing

You must have a **sponsor proposal** and it must be **compelling**. Detail all the possible ways to contribute to your event and what visibility is offered in return. Create a sponsorship grid detailing amounts and marketing opportunities.

Go beyond the usual of including the sponsor in all advertising, event promotional pieces, event program, catalogue, or inclusion in all media releases. Work together to find marketing **opportunities** that the sponsor will get excited about. Leverage their marketing team in order to help yours: they are likely to have a team of sales and promotion people who you can work with to develop a solid plan. Be sure to share your non-profit knowledge and be clear that fundraising is not like traditional marketing, it must be authentic and from the heart or people will see right through it — reducing their philanthropic image and your charity's credibility.

Corporate sponsorships are an excellent way to create strong relationships and give you the resources you need. They add to your credibility and have the potential to open many other doors (board member recruitment, volunteers, other sponsorship opportunities, etc.).

Be sure to publicize your corporate sponsors on your **website** to let people know you are trusted by respected businesses.

Sponsor wrap-up

You are now equipped to embark on planning your own sponsor acquisition campaign! It's time to make a plan that works for your organization in consideration of the time, resources and talent at your disposal. If you're launching your first event, remember, you don't have to do everything in year one. Take on as much as you can without going overboard. Start small and build upon your year one foundational work in years to come.

Nailing event logistics

Organizing the necessary tasks and responsibilities chronologically is key to getting your event off the ground. You need to line up the time, talent and teams needed to pull off your event and create the best experience possible, not only for attendees, but for the staff and volunteers contributing to the event.



Staff and volunteer teams

Select your planning team

Tip: Even the smallest, volunteer charity needs a team to pull off a successful fundraising event! Don't worry. You're closer to a team than you think! The number of members you need will depend on the size of your event but in addition to the core team members, you'll almost certainly need more help. Try to bring on team members with the right connections or know-how to take on specific projects such as sourcing, setting-up, taking-down, and returning the entertainment system.

Once you have decided the size and scope of your event, it will help you determine how large of a group is needed. The structure of your committee will also depend on your organization and your event. Be sure to create specific positions. Everyone should know their role, even if they are wearing many hats. Most planning teams should have a chair, treasurer and sales team.

Be respectful of the dynamic between volunteers and staff. Staff are paid, but events often require going above and beyond the call of duty. Show appreciation for their time both personally and publicly. Being acknowledged in a group is always a nice way to keep people engaged. Volunteers are involved for more emotional reasons, often because they have been personally touched by the cause. Be clear with what your expectations are with volunteers and leave room for them to provide input. Ask them if they are comfortable with what's being asked of them or if they can take on more. With both groups, their hearts are often in the right place but the reality of how much time they can dedicate may be a different story.

Set realistic goals and keep the lines of communications open.

Extensive onboarding & training

Providing staff and volunteers with an effective onboarding process and delivering on your event branding is crucial for fundraising success and volunteer retention. No matter the size of your organization, plan and develop an onboarding/orientation document to help the team become productive and engaged as quickly as possible. The document should have a warm welcome and outline the goals of the event. Make sure to include an organizational structure to provide everyone with the big picture. There may be a big learning curve for some, so take into consideration that not everyone will get up to speed at the same pace.

Outline the do's and don'ts for each role and provide a draft of the event checklist so people know what to expect. Especially draw attention to the post-mortem meeting after the event. So many volunteers think their commitment is done when the event is over, but the debrief is just as valuable to the organization as is the initial planning.

Event playbook

You'll need a broad calendar outlining what needs to get done six months ahead, two months ahead, one month, one week, and so on. For each phase, you will need to plan your logistics, human resources and marketing needs.

Tip: Your core supporters want to help you! Pass dates and any other decisions you're not sure of by a few of them to ensure your going down the right path.



TIP: Document everything!

If you evaluate your event formally with surveys, this information should also be added to the post-mortem.

Logistics



Pick your date. People have a lot of options so think about your target audience — what else will they be doing? Avoid choosing a date that will conflict with other popular events or holidays. You can Google your planned date to see what else is happening on the local scene by typing the name of your city and the date (making sure to include the year).



Develop a budget. Be realistic, negotiate with vendors ahead of time and include expenses, anticipated revenue, sponsorship, and any donations in kind. Review the budget with the committee and organization's executive team.



Create attendance projections. Consider minimum attendance required for the event to run, maximum event capacity, and try to use past event attendance to project your numbers if this is a recurring event.



Choose a venue that will be attractive to participants but always based on your budget, projected attendance, and space requirements.

Once the basics are agreed to, you'll need to plan for:

- Speakers and special guests
- Catering and decoration
- Sponsorship needs
- Day-of marketing material (*program, slide show, banners, etc.*)

Don't forget to:

- Reconcile the budget and present an overall event budget back to your organization.
- Prepare a report for future event organizers:
 - Recap of the event (*who, what, where, when, why*)
 - Evaluation comments
 - Recommendations for future events
 - Contact information for services / resources that were used
 - Final budget
 - File containing sample promotions, task lists, photos



Managing your event team

Communications are important, especially when working with volunteers who work remotely and are juggling other responsibilities. Check in with all members of the planning team regularly. Make sure everyone understand his/her role and responsibilities within the team.

Circulate a contact list (name, responsibilities, email, phone, etc.) to all planning team members.

Use cloud solutions for task assignments and collaborative tools like Google Drive or Trello for scheduling and content development to avoid emailing files back and forth creating version control issues. Having a tech savvy committee member will help get you organized and operating to maximum efficiency.

Set up a meeting/planning schedule with those involved in the event. Send out regular reminders with action lists and deadlines. The more time you put into getting and keeping your people organized, the easier it will be on everyone involved. Be specific about where, when, and why you'll meet.

And finally, the biggest time saving tip of all! For each meeting, take the time to prepare a meeting agenda with clear objectives. Send out a meeting schedule or planning timeline so your team knows what to expect and they can commit to being there. We recommend you incorporate some team building activities and icebreakers into your first few meetings so people can get better acquainted and gel faster as a team.



Marketing

Just as you need a fundraising goal, your event needs a strong marketing strategy.

Tie your event theme into your marketing efforts for consistency, and have fun with it. You'll want to create a unique visual image and stick with it. The event visual should relate in some way (big or small) to the rest of your organization's image. The event brand (or lead sponsor logo) should never overshadow your main brand. Don't let your *Big Mac* be bigger than your *McDonalds*. A consistent message throughout your promotional material will help your event stand out and avoid brand confusion with other organizations.

Get professional help (paid or volunteer) to draft posters, flyers, banners, social media graphics, and your all-important online event page where people can buy tickets. Ask the designers to share the layouts with the planning team for review and input.

Ask printing companies, if needed, to give you discounted quotes or gifts in kind for printing costs. If you don't ask, you don't get!

Have a reliable online presence involving your website, social media and email marketing elements. Keep your supporters up-to-date with information about your event on all channels and invite them to contribute content before, during and after the event. Real **people** sharing real **stories** creates real **influence**.

Help them help you

The people who work on your event are your brand ambassadors. These are people who provide credible, trustworthy promotion and visibility to your organization.

Each individual should be given a cheat sheet containing your organization's mission, vision and value statements. If this is a recurring event, equip them with the last post-mortem so they understand the history of the event (especially when it comes to sponsorship rejection to prevent barking up the wrong tree).

It's important that your staff and volunteers understand your objectives and are all on the same page. Their individual reasons for contributing to the event may differ, but the base of what your organization does and why the event is important should be consistent throughout.

Be sure to provide them with sound bites they can use in personal emails and social media to help spread the word about your event. Have them tell their own touching stories to invite friends and colleagues to join the cause.

Never let your technology surpass your humanity, but recognize that there are a myriad of tools at your disposal to help your helpers spread the word about the good work you are all doing: blogs, social media, email marketing — find the channels that appeal to your key constituents and reach out!

Show them appreciation



After the event you'll need to plan a volunteer or planning team thank you (meal, small gift or card) relative to the size of your event and team.



We're often far too busy jumping ahead to the next thing on our list than to plan a wrap-up or gratitude meeting, but it's critical to understanding the successes and challenges, making recommendations for the future and especially recognizing the efforts of the people who helped make it happen.



Be sensitive of the fact that while volunteers appreciate the recognition, most do not want to see the organization spending money on them to say thank you. Try to get the meal or gift sponsored so your organization doesn't incur any out of pocket expenses. The volunteers, after all, gave their time for the cause, not to have the money spent on them!

Become an event guru — it's easier than you think

You want your event to be original and stand on its own so keep an eye out for what other charities are doing. You can start by visiting their website and social media pages, or better yet, get out there and go to events to experience things first hand.

Don't be shy to ask for help — you're a charity, use your network and look for pro bono support — even an hour meeting with a consultant or outside professional can help you stay on track.

Check to ensure that you have enough help. Are all the volunteer roles covered? Have you allocated enough help for each task?

Detailed budget tracking

It was Antoine de Saint-Exupéry who said "A goal without a plan is just a wish." Planning your budget is essential, you don't want any surprises. Use the following list to help track your expenses. Depending on the nature and size of your event, you may add or subtract items from this list. Include everyone on your team, leave no stone unturned!

Logistics

- Event insurance
- Contracts
- Permits

Marketing

- Marketing tools
- Email marketing
- Social media promo
- Survey tool printing
- Shipping
- Video production
- Photography
- Web development
- Media relations
- Merchandise & giveaways

Communications

- Printing
- Signs
- Maps
- Flyers
- Schedule/program
- Banners
- Mobile app

Registration

- Software
- Online fees
- Badge printing
- Signage

Speakers

- Compensation travel
- Accommodations food
- Thank you gifts
- Workshop materials

Sponsors

- Thank you notes/gifts

Staff

- Salary / compensation
- Travel accommodations
- Food

Facility

- Venue rental
- furniture, serving items, decor food/drinks
- A/V equipment & labor
- Security technology (WiFi, IT support)
- Badge scanning

Activities / entertainment

- Music/DJ
- Rentals
- Auctioneer
- Emcee compensation

Attendee services

- Shuttle service
- Charging stations
- Coat-check
- Storage
- Babysitting

Plan for the worst, hope for the best

Always, always have a Plan B. In some cases, you'll need C, D and E! Create a detailed plan and contingency plans — and share the plan and a go-to contact list.

Laura Capell, author of *Event Management For Dummies Cheat Sheet* recommends planning for potential risks early in the process, giving you time for better communication with your team, but the extra time also helps avoid costly surprises in your budget.



The potential risks to consider when writing your contingency plan can be outlined as follows:

Physical

Any accident, fire, flood or other natural disaster that would have an impact on your equipment, buildings, or stock

Team

Your team is only human, so illness, grievances, or industrial action may affect them. What do you do if half your volunteers can't / don't show up the day of?

Legal

What might someone sue you for is the easiest question here. Or, are you confident that the event you plan to run is legal? It's best to not leave matters such as this down to chance.

Technical

Everyone relies so heavily on technology now that they often assume it will always work. Think about how you'd run a barcode registration process without a computer or barcode reader that works.

Political

Riots, protests and changes in policy can all affect the success of your event. If, on the day of your event, you read a press release that negatively affects your cause, what do you do?

Talk through the above scenarios with your team. Write down the potential course of actions for surprises and who will take charge in each case. Yes, it's more time upfront in the planning phase, but trust that you will not be in a proper head space for critical decisions when things go south.



Reaching your fundraising goals

Creating a Digital Event Sales Page that works

A **clever event name** and main visual will go a long way to ensuring the success of your event. Think about your audience, the tone and the style that will appeal to them. Understand their world and work within their level of comprehension. For example, if you are targeting millennials, don't use catch phrases or terms that only baby boomers would understand – and vice versa. If you're targeting a wide range of ages and cultures, be sure to choose a name and visual that won't offend or confuse the audience.

Make all the **key details** easy to find: date, time, and location with a map. So much time is wasted having people call your organization for details when they can be so easily shared on an online event ticket page, your invitation and marketing materials. Even worse, some people won't even bother to contact you, they'll move on to something else and you'll lose out on a potential attendee.

Say it with words and visually with pictures and video. Online tools make it easy to **get creative** using a multi-channel, multimedia approach. Be sure to always have reproduction rights to the content, and give credit where credit is due. Just because you are a charity doesn't mean that you are exempt from plagiarism or copyright infringement!

Keep in mind best practices for **user experience** and keep it clean. For your web page event sign up, only offer information relevant to each step as you can share other details only after you've sold the ticket below the fold or on the next screen.

Want to **increase attendance** without nagging? Include the "Add to calendar" feature to the checkout process. Many online tools also provide automatic reminders with tickets that you can customize with your own personal message. Take advantage of these features so you can spend your time on other important matters.



Ready to Invest? Don't overlook Search Engine Marketing

We know many charities, possibly the majority of charities across Canada, simply do not have the budget and capacity to consider Search Engine Marketing (SEM), geo-targeting, and demographic targeting, and retargeting. That said, increasingly charities of all sizes are investing in paid advertising to achieve their goals, securing the free Google Grant and then going on to invest over-and-above marketing budget. For those of you considering this next step, useful information follows on leveraging SEM to reach your goals.

Search Engine Marketing (SEM), SEM as defined by Wikipedia is “A form of internet marketing that involves the promotion of websites by increasing their visibility in search engine results pages through optimization and advertising.”

SEM traffic is considered the most important source of Internet traffic because it is targeted. People use search engines to find an event, a solution to a problem, or to learn how to do something. So when searchers click on a website from the search results or click on an ad, they are more likely to convert. The relevancy of the displayed websites and ads makes SEM traffic more valuable than any of the other sources.

Facebook and Twitter are optimizing their advertising platforms to utilize targeted traffic, but still traffic coming directly from search engines has a better ROI.

Google is the #1 search engine so it's an important channel to consider. You can target ads locally and globally and you only pay when you get results. There's even discounted pricing for non-profits. You can build budget friendly campaigns and easily manage your results through Google Analytics and you can make adjustments to campaigns in a matter of moments, you are always in control.

AdWords location targeting allows your ads to appear in the geographic locations that you choose: countries, areas within a country, a radius around a location, or location groups. Location targeting helps you focus your advertising on the areas where you'll find the right customers, and restrict it in areas where you won't — which could help increase your return on investment (ROI) as a result.

It may seem creepy that we can pinpoint such specifics, but if you use it to benefit your event, you'll be happy you did! Reach out to a digital marketer for help if you're interested in growing your audience using online advertising.



Selling out

There are countless ways to reach audiences, but the trick is knowing where your time and money will be best spent.

The obvious channels are your website, social media, and email.

Remember to place a registration button in a very obvious place on your **website** (in the top navigation area, on the homepage or in the sidebar of the inside pages: sprinkle it where ever you can!). The button should lead straight to a signup page (such as your charity's custom branded event page on CanadaHelps, not force the visitor to click three more time to enter their information. The more clicks they have, the more chances they will not complete the transaction. You should, by all means have a page that details the event, but for registration you want to keep it simple and straightforward.

Social media is a very affordable way to promote your event. You can create a Facebook event page, and social media ads are pretty cheap. You can share posts about sponsors commitments, factoids about the event, thank volunteers and send out teasers leading up to the event. Equip your committee members, board members and ambassadors with little scripts they can share with their own networks to help spread the word. Always provide visuals and appropriate links leading back to your organization's website or event page for more information. Be sure to respond to all comments as quickly as you can.

A **social media** study by Search Engine Watch found that 53 percent of users who tweet at a brand expect a response in under 60 minutes (a bit more leniency can be assumed for charities, but not much). Twitter is the most real-time of the social networks. Timely responses are imperative on Twitter and highly encouraged everywhere else.

Email marketing is only as effective as your organization's database. While it is not recommend that you send unsolicited emails, your organization should take the time to create dedicated mailing lists based on interest and targeting your content to each of these groups will lead to higher returns on your campaigns, especially when it comes to events. Again, this is more time upfront in the planning and setting up phase, but greater return down the line.



Specials and contests

Early bird specials and creating contests like “share for a chance to win your tickets” are great ways to get people to sign up quickly. You can incentivize ticket sales if your margins permit. For example, one ticket for \$60 or two for \$100. This encourages participants to bring a friend which in turn expands your audience without affecting your bottom line too much (\$20 less in revenue but you gain a new participant.)

Some organizations opt for a tiered model of tickets. This can either be a VIP offering (ex: meeting celebrities and honoured guests before the event starts in a more intimate setting) or a post-event after party with a select group.

Incentives at the event ensure a good turnout. Goodie bags with gifts provided by sponsors are always well received as are auctions and draws for door prizes. These activities add excitement to the event and leave people wanting to participate in the next event you host.

Incentives are relatively risk free. If they work, they increase attendance and show what motivates your participants. If they don't, the worst is that you'll have to move on to the next one. Just be sure to document feedback in your post-mortem so you know how to adjust for your next event. And, ensure you're up to speed with split charitable receipting rules if you're providing an advantage with the event ticket, and choose an event management platform such as CanadaHelps that supports split receipt tax receipts.

360 engagement

Social media and email marketing can be your best friends leading up to the event. So many messages can be drafted ahead of time and scheduled, freeing you up to take care of other pressing matters.

During the event you want to take as many photos as possible and enlist a volunteer or staff member to **post on social media in real time**. Most guests love to share the action on their own channels during and right after events. If they have to wait three days, it's already old news and they'll be less inclined to talk about your cause.

Remember to create a **hashtag** for your event — but only if you know how to use hashtags properly. If you don't know how they work, leave them out. Misuse of hashtags can turn a good post bad. Proceed with caution!

Capture and post all the **video** and **photos** you can and make the extra effort to write captions and tag sponsors. Do this as soon as possible following the event and you'll see more loyalty from attendees and sponsors alike.

Post event, you'll want to **thank** everyone. Think once again about your demographic. Would an email suffice or is this crowd more likely to appreciate a written note in the mail? Always tailor your communication to your audience, not what's cheapest or fastest for your organization.



Nailing the event logistics

Here is a summary for how to plan for a typical event²

Start your planning as early as possible.

4-6 months before

- Establish event goals and objectives
- Select event date
- Identify venue and negotiate details
- Develop an *Event Master Plan*
- Get cost estimates (e.g., room rental, food and beverages, equipment, speaker fees, travel, etc.) and create a budget
- Recruit event committee, event manager or chair and establish sub-committee chairs
- Create and launch publicity plan and brand your event
- Identify and confirm speakers/presenters/entertainers
- Identify and start contacting sponsors/partners

3-4 months ahead of event

Entertainment (if applicable):

- Get bio and photo
- Organize travel and accommodation arrangements
- Have contracts signed if appropriate, etc.

Finance and administration:

- Establish registration fees
- Set up / enable online registration
- Sponsor levels / amounts
- Identify any items that need to be underwritten
- Ensure your accounting tracking processes are in place

Venue and logistics

- Investigate need for any special permits, licenses, insurance, etc.
- Determine and arrange all details regarding menu, A/V equipment, registration set-up, parking, signage, etc.
- Review security needs and plan for the event with venue manager

Publicity

- Develop draft event program
- Create draft event script (e.g., MC, speaker introductions, thanks, closing, etc.)
- Develop publicity pieces (*newsletter articles, social media ads, radio spots, print blog posts articles, etc.*)
- Request logos from corporate sponsors for online and printed materials
- Develop and produce invitations, programs, posters, tickets, etc.
- Develop media list and prepare news releases, media advisories, backgrounders and all media kit materials (speaker info, photos, etc.)
- Create an event page on your website
- Enable/create email event notifications
- Create a Facebook event page
- If you can, develop a short video to post on YouTube and share across all channels
- Register your event on pertinent online community event calendars
- Create some buzz on your blog, ask sponsors to mention your event to their customers

Determine VIPs and create invitation and tracking spreadsheet (or use a CRM tool)



TIP: This example is for a larger scale activity, but can be scaled back in a way that suits your organization. Smaller events often need less lead time, so adjust accordingly.

²Source: <http://www.wildapricot.com/articles/eg-event-checklist>

2 months prior to event

- **Send reminders to contact list regarding registration participation**

- **Presenters/Speakers**

- Confirm travel or accommodation details
- Request copy of speeches and/or presentations

- **Sponsorship: Follow up to confirm sponsorships and underwriting**

- **Publicity**

- Release press announcements about keynote speakers, celebrities, VIPs attending, honourees, etc.
- Post your initial event news release on your website and circulate to all partners, affiliated organizations, etc.

1 week ahead

- Have all committee chairs meet and confirm all details against Master Plan – and ensure back-up plans are developed for any situation (e.g., *back-up volunteers as VIP greeters, additional volunteers for registration or set-up, etc.*)
- Finalize event script
- Brief any/all hosts, greeters, volunteers about their event duties and timelines
- Final seating plan, place cards, etc.
- Provide final registration numbers to caterer
- Make print and online copies of any speeches, videos, presentations, etc.
- Final registration check, name badges and registration list
- Determine photo op and interview opportunities with any presenters, VIPs etc. and confirm details with interviewee and media

1 day ahead

- Confirm media attending
- Ensure all signage is in place
- Ensure registration and media tables are prepared and stocked with necessary items (e.g., *blank name badges, paper, pens, tape, stapler, etc.*)
- Ensure all promo items, gifts, plaques, trophies, etc. are on-site

Event day

- Ensure you have copies of all instructions, directions, phone numbers, keys, extra parking permits for VIP guests, seating charts and guest lists with you
- Check-in with each Committee Chair to ensure their team is on track

Within 1 week after the event

- Prepare tax receipts
- Gather feedback from participants
- Financials: gather all receipts, documentation, final registration data, etc. and update budget
- Send thank-you's and acknowledgement letters to sponsors, volunteers, speakers/presenters, donors and to the media
- Hold your post-mortem meeting with the committee and internal team

1 month after the event

- Roll out the post-event follow up campaign



Increasing fundraising at the event

Sell tickets at the door: mention on your event page that tickets may be purchased at the event but in case they sell out quickly, it's best to purchase them ahead of time. You can even incentivize it by having different pricing: \$20 in advance, \$30 at the door.

Set up donation kiosks: it's as simple as setting up a table with a computer that is set to your donation page. If your donation page is mobile optimized, you can also have volunteers with tablets or mobile devices work the room, explaining how easy (and secure) it is to give via credit card to show their appreciation of the event and support the organization.

Silent auction: if you're interested in raising extra funds at your event with an auction, it would be beneficial to have a **sub-committee** dedicated to gathering prizes and organizing the table(s). Just as you have designed your sponsorship kit, you should have a one page document to present to potential auction sponsors that outlines the event and the benefits of participating. For the auction itself you'll need clear bidding sheets next to each of the items and someone to oversee the timing of the auction. Participants should be given a sheet listing all the prizes and sponsors who donated them. If you have an emcee for your event, get them to remind participants throughout the event to visit the silent auction table and drive home how important the extra funds are to the organization. If you have visuals (screens) at the event, include a few slides throughout the event as a reminder as well. Post-auction requires following up with the winners and can be very time-consuming, so be sure to stipulate that all prizes must be collected at the event. You don't want to be spending money on shipping! Many steps are involved in running an auction within an event, but the payoff can be huge provided you have the contacts for getting good gifts and the human resources needed to manage it all. As lucrative as an auction can be, it can also distract from your event or might not please your guests, so give it careful consideration.

Keep the love alive

After the lights have dimmed, the crowds have dissipated and the money has been counted, your work is still not done. Thank you's need to be sent out and post-mortems should be conducted. In your meeting, discuss what follow up campaign can be developed to keep in touch with participants. Plan for a follow up a few weeks or a couple of months later to let participants know where the money has gone and how it made an impact. In that update, ask them to continue supporting your cause through monthly giving or other means of donating. Perhaps you need more volunteers for the next event: a follow up email to participants is a smart way to recruit.

Along with vibrant images that help re-live the event and provided links to online resources such as albums and resources, consider adding testimonials from speakers, guests and beneficiaries, or soliciting feedback and testimonials from participants. Organizations are often in a hurry to scurry on to the next task at hand, but time should be invested in post-event follow ups to ensure that all the hard work that went into creating that magical event can live on in the hearts of the participants and encourage them to take the relationship to the next level.

Events from CanadaHelps



Save Time and Money, and Increase your Event's Fundraising Success

Running charity galas, tournaments, webinars, and other events is easier and more cost-effective than ever before with the Events platform from CanadaHelps. Designed for charities, Events from CanadaHelps dramatically reduces administrative costs, enabling seamless online ticket sales, multiple ticketing options, and flexible split-receipts. Complete with real-time sales reports, automated event reminders, and simple at-event attendee check-in, Events from CanadaHelps takes the stress out of running events.

"With our new Events tool, we're adding a significant enhancement to our popular array of tools, designed specifically for charities to increase their fundraising capabilities. We work with over 16,000 charities and we are always listening closely to their fundraising needs. When we ask our charities how we can help them succeed in maximizing their fundraising results, providing an accessible, affordable events platform almost always tops the list. Finally, there is an affordable Events Management solution from CanadaHelps."

- Marina Glogovac, President and CEO at CanadaHelps

Ready to get started? Get in touch today.



CanadaHelps is your Trusted Partner for Securely Fundraising Online.

Phone: 1-877-755-1595 Ext. 2398 | charities@canadahelps.org | www.canadahelps.org

CanadaHelps – CanaDon is a registered Canadian charity | BN: 896568417RR0001

Accredited under the Imagine Canada Standards Program

From selling tickets to issuing tax receipts, CanadaHelps makes running events easy!

Start selling tickets for your charity event in minutes.

Robust Ticket and Flexible Receipting Options



- Create the perfect mix of ticket types to maximize your fundraising results.
- Run free and/or paid ticket events for any size group of attendees.
- Accept donations online.
- Receipt when you're ready. Once you know all your costs, enter the amount eligible for a tax receipt by ticket type (if applicable) and we'll instantly issue tax receipts.

Customize and Brand Your Event



- Tell your story with words, photos and videos on your event page.
- Choose the brand colour palette, and add a marquee image to your event page and emails.
- Add custom questions to get all the attendee information you need, like meal preference or T-shirt size.
- Add custom messages to purchaser and attendee emails, and more.

Increase Ticket Sales and Event Attendance



- Mobile-optimized so buying tickets is easy, anytime, anywhere and on any device.
- All major payment methods accepted.
- Social sharing features encourage attendees to invite friends and family, and promote the event.
- Dynamic attendee wall showcases who is coming and inspires others to get their tickets.
- One-click add to calendar and automated email reminders keep your event top of mind.

Painlessly Manage Your Event



- Real-time reporting dashboard shows number of tickets sold, dollar proceeds, and more.
- Detailed ticket sales report and online attendance feature.
- Change in logistics? Use the built-in email tool to notify ticket purchasers.
- Easily import donor information into your Raiser's Edge or Salesforce CRM.

Ready to get started? Sign up for a FREE CanadaHelps Full Fundraising Account and access our full suite of leading edge, secure, low-cost tools, including the powerful Events Solution. Only use the services you need.

Learn more at www.CanadaHelps.org



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About the Author

Kim spearheads her unique firm Phil Communications and has been active in communications and fundraising for 20 years. She's an incurable optimist whose involvement in charity work started early in life and now has become a way of life. Leading a talented group of cause-focused specialists, her team aims to elevate the level of professionalism in the social sector to improve communities locally and abroad. Kim is a Certified Non-profit Consultant, holds a BFA from Concordia University and is actively involved in her community. Proud mother of two boys, one dog, two cats, one fish; happy wife, Guinness enthusiast and world traveller!

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This resource was brought to you by CanadaHelps, in partnership with Kim Fuller at Phil Communications.



Did you benefit from this resource?

Learn more about CanadaHelps and our fundraising solutions for charities [here](#).

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