



## ***Strategic Event Fundraising***

Fundraising is an important part of an organization's fiscal sustainability. Fundraising can provide unrestricted funds to build capacity, fund capital expansion and improvements and subsidize programs that are mission critical but not fiscally viable.

Event fundraisers should generate unrestricted revenue, build relationships, provide for donor recognition and increase awareness. Those events that do not meet these criteria can become taxing on organization resources and should be culled from your event schedule.

The worksheet below provides a framework to plan a successful event or evaluate the viability of event.

The bulleted points below explain the categories on the worksheet to guide and evaluate your event:

- ***Organization Strategies*** can be financial, awareness, recognition, motivational or supportive of another goal. Your event should support your marketing and communications strategy.
- ***Audiences*** should include all those categories of individuals you are targeting for this event (donors, funders, participants, sponsors, government, volunteers, staff).
- ***Goals*** are short-term and long-term measures of success across your audiences and organization strategies. Identify what a successful event should achieve (number of tables or participants at a certain price point, amount of media awareness, number of donors/funders with whom you wish to meet and what you want to receive from them following the event).
- ***Handoffs*** are the actions, people, timelines and measures to implement event goals beyond the day of the event. To whom are

you “handing off” activities following the event. Example: Executive Director or Development Director personally meeting with 10 top funders who attended or did not attend to talk about the objectives of the event and the success achieved. We are always looking for reasons to get in front of funders and donors, this can be an opportunity to get feedback and gauge future involvement.

- ***Estimating Revenues & Costs*** early on will help you make a decision about whether this event meets your net revenue criteria.
- ***Number of Staff Hours*** is an important criteria to consider because we often do not place the same value on our internal resources. Make sure your picture of what it takes to create and implement an event is clear.
- ***Estimating Board and Volunteer Hours*** will help to determine if this is the best use of their time and energy, or if you should engage them in an area more advantageous and supportive to the organization.



## ***Strategic Fundraising – Event Worksheet***

Select one event for your organization. Complete the form below considering the challenges and opportunities you encounter in planning and implementing your event.

***Event Name:***

Identify ***Organization Strategies*** this event serves:

***Audiences:***

***Goals*** – short & long-term:



## ***Strategic Fundraising – Event Worksheet, Page 2***

***Handoffs:***

Estimate ***Revenues & Costs:***

Number of ***Staff*** Hours:

Estimate ***Board & Volunteer*** Hours: