



# BEST PRACTICES FOR SPECIAL EVENTS – FUNDRAISING AND FRIENDRAISING

PRESENTED BY MAGGIE KATZ

PROFESSIONAL FUND RAISER FOR 35 YEARS

## EVENT USAGE

- Events should be approached carefully and used sparingly.
- They are generally very labor-intensive, taking a lot of your effort to raise less money than a well-cultivated donor can provide.
- Events are an important supplement to major gifts, providing a different way to reach out to the community.
- Events are useful for friendraising and visibility but are not your most effective way to raise dollars.

## EVENT VALUE

- Friendraising is an important benefit of events.
- Especially in the new reality that COVID has brought us all, opportunities to be face-to-face with volunteers and donors are harder to create, but more important than ever.
- Raising money is a relationship business and events provide opportunities to build relationships.
- Use events to cultivate and steward those who give you their time and money.

# GOALS

- Set goals so you know what you are trying to do. And don't try to do too much.
- Is your event about:
  - Making money
  - Attracting new donors
  - Honoring your volunteers
  - Highlighting corporate partners.
- Know your focus so you can target your efforts.

# PUBLICITY

- Publicity is key. It is not so much about selling more tickets as it is about using your event to raise the profile of your organization.
- Get your name out to the general public in a positive context.
- Use the opportunity to share information about your mission to a wider audience.

# CULTIVATION

- Use events to cultivate your volunteers and donors.
- Use key volunteers on your planning committees and highlight them, on the invitation and at the event.
- Major donors can be listed as honorary chairs to differentiate them from those actually planning the event.

# SPONSORSHIP

- Provide sponsorship opportunities.
- Know what you are offering and be able to articulate it in a sponsorship packet and in conversations.
- Be aware of your audience and be able to quantify it:
  - We will have 300 residents of Wayne County, at least 25% from the Grosse Pointe and Grosse Ile areas.
  - We expect approximate 60% to be active in local businesses including the auto and banking industries.



## MORE ON SPONSORSHIP

- Ideally, you want to secure a few large sponsors before going public in the same way you wait until you have significant commitments before announcing a campaign.
- This:
  - Assures you of success
  - Allows early donors to feel special
  - Gives you names to use when soliciting other sponsors.



# SPONSORSHIP PROSPECTS

- Know your target sponsor audience and be selective in who you solicit.
- In some cases, you might find that multiple businesses from the same industry might all want to be represented.
- In other cases, only one business from each industry may want sole access.
- This is where knowing our audience is vital. If a business wants sole access, charge a premium for that access.

# INVITE DONATIONS

- Give those unable to attend the event the opportunity to make a gift to support your organization right on the invitation.
  - If you are unable to join us but wish to support our mission, please know that your gift will make a difference to those we serve.

# EVENTS WITHIN SPECIAL EVENTS

- Consider events within the event:
  - Silent auction
  - Live auction
  - Raffle.
- Ask local businesses for gifts-in-kind. It is far cheaper for them to give you their products than cash gifts and ensures they have visibility.
- In the case of services, it can get them customers to sample their business.

## CAUTIONARY NOTES

- Avoid events that simply pick the pockets of the donors you already have, so you do not cannibalize your current donor rolls.
- Avoid laying out money before revenue comes in. Spending a lot on fixed costs before you have any money coming in can put your organization in a difficult situation.
- Be aware of other organizations' events and avoid stepping on their toes, from both a time and theme perspective.

## REFERENCES

- Ask for and check references before working with groups/vendors. Do not presume that they are good at what they do just because they give you references. Very few people follow through, so bad vendors will often take the risk of providing references. Also, they may not be problematic, they just may not be the right match for your organization.
- If you have trouble with a vendor, pass that along to appropriate authorities so others do not have the same problems you did.

# SUMMARY

- Special events are important for friendraising and visibility.
- Events can be used to cultivate and honor donors and volunteers.
- Knowing what you are offering sponsors is important to selling your event.
- Gifts of products and/or services can support auctions and raffles within your event.
- Check references.

## MOST IMPORTANTLY

- Have fun, even/especially at formal events. That is what people will remember.



# CONCLUSION

- “The Service you do for others is the rent you pay for your room here on Earth.” – Muhammad Ali, 1978
- Thank you for paying your rent through the important work you do. You truly make the world a better place.

# Are You Ready for a Capital Campaign?

April 27, 2022

Scott S. Trudell, MSM

Experienced Non-profit  
Campaign Executive

[Scott.S.Trudell@icloud.com](mailto:Scott.S.Trudell@icloud.com)

# Biography

- ▶ 25+ years of experience in the southeast Michigan non-profit sector
- ▶ Specializing in strategic management, organization, and implementation of fundraising campaigns
- ▶ Worked at many outstanding non-profits including:
  - ▶ The Detroit Zoological Society
  - ▶ Henry Ford Health System
  - ▶ Children's Hospital of Michigan Foundation
  - ▶ Oakwood Health Foundation
  - ▶ Walsh College
- ▶ Voracious reader, outdoorsman, and sci-fiction geek

# What is a Capital Campaign?

## Significant Fundraising Effort for Organizational Needs

- "Bricks & Mortar" / Buildings / Equipment
- Endowment / Scholarships
- Programs / Research / Outreach
- Staff Support - Continuing Education / Training / Salaries

## Characteristics

- Major & Transformational Gifts
- Pledges over a set period of time
- Specific Timeline
- Involves "Human Capital"

# Infrastructure Needs



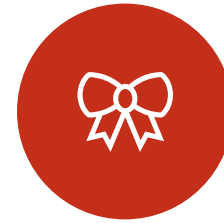
ETHICAL  
STANDARDS



DONOR SOFTWARE



HISTORY OF  
DONATIONS



GIFT ACCEPTANCE  
& RECOGNITION  
POLICIES



STAFF SUPPORT

# The Pre-Campaign Planning



Case for Support - The Appeal



A Clear Established Goal



Prospective Donors



Effective Leadership Potential



The Right Timing



Public Relations and Communications Plan



Campaign Management



A Prescribed Budget

# The Feasibility Study

## What is a Feasibility Study?

- Getting the hard answers to the hard questions.
- Thorough examination of the institution's readiness to ask, and the constituents' preparedness and willingness to give.
- This is where you:
  - Question
  - Measure
  - Qualify
  - Verify
  - Weigh Judgements

Internal Staff vs Outside Counsel



# The Feasibility Study



## Study Interviews

Confidential  
Straight forward  
In-depth



## Who do you involve?

Organization Leadership  
Program Staff  
Governing Board Members  
Current Major Gift Donors  
Prospective Donors  
Campaign Leadership Prospects

# The Questions

## Case for Support

- Is this well defined? Reflect the mission and objectives? Does it have strong appeal? Is it understandable?

## A Clear Established Goal

- Is this realistic?

## Prospective Donors

- The Gift Chart
- 4 prospects for EVERY gift

## Effective Leadership Potential

- Campaign structure, leadership prospects, Askers / Advocates / Ambassadors

# More Questions

## The Right Timing

- Are there conflicting campaigns? What impact on the institution as a whole? Enough time?

## Public Relations and Communications Plan

- What activities do you need? Are there external / internal issues that may harm the campaign?

## Campaign Management

- Enough volunteers? Development staff?

## A Prescribed Budget

- How much will it cost? Will management / board approve funding? What is the ROI?

# The Campaign Gift Chart

<b>Major Giving</b>					<b>Expected % of</b>	
<b>Gift Range</b>	<b># of Prospects</b>	<b>Average Gift Amount</b>	<b>Expected # of Donors</b>	<b>Expected \$ from Level</b>	<b>Total from Level</b>	
\$1-3M	3	\$ 1,000,000	1	\$ 1,000,000	24%	
\$500k-\$999k	3	\$ 500,000	2	\$ 1,000,000	24%	
\$250- \$499k	4	\$ 250,000	2	\$ 500,000	12%	
\$100-\$249k	16	\$ 100,000	8	\$ 800,000	19%	
\$50-\$99K	36	\$ 50,000	10	\$ 500,000	12%	
\$25-\$49k	39	\$ 30,000	10	\$ 300,000	7%	
\$10-\$24k	15	\$ 15,000	9	\$ 135,000	3%	
				<b>REQUIRED MAJOR GIVING</b>	<b>\$ 4,140,000</b>	
				<b>EXPECTED MAJOR GIVING</b>	<b>\$ 4,235,000</b>	

# So....Are You Ready?

A well-developed case that aligns with the organization's mission and business plan.

An involved and committed board

An informed constituency with a history of support

The support from the chief executive officer and organizational leadership

An adequate budget for the campaign

Qualified staff and campaign structure

Infrastructure to support campaign

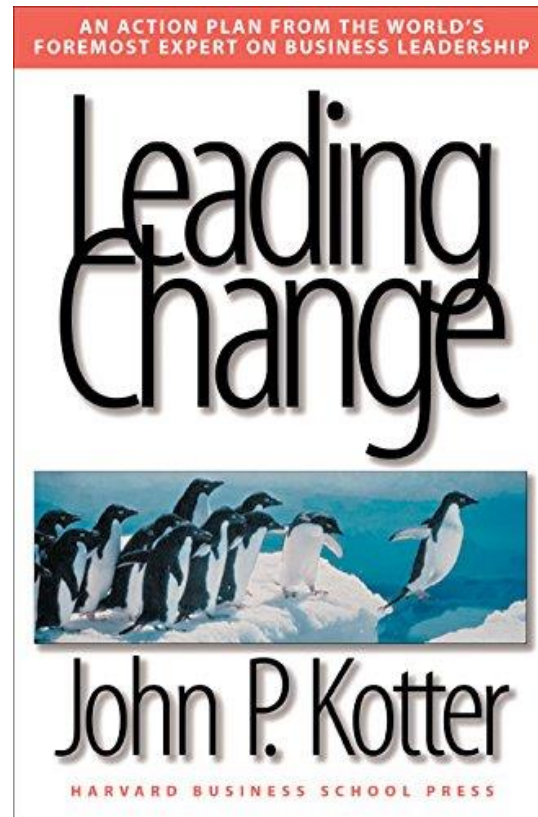
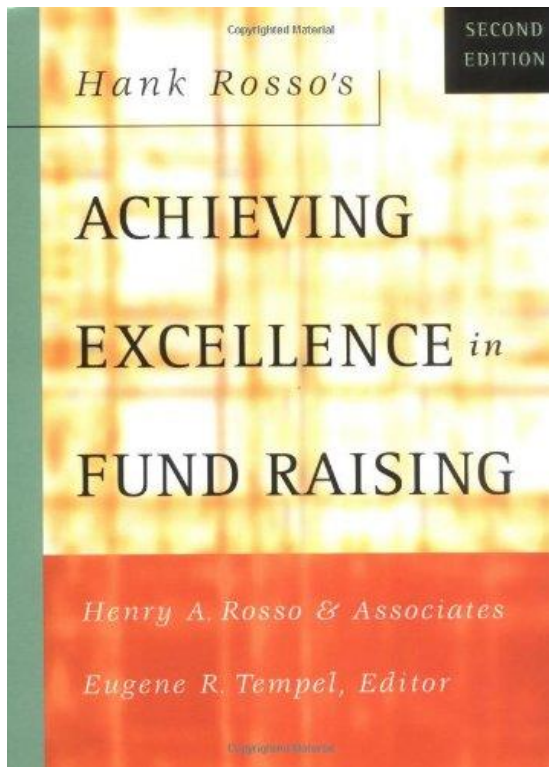
Adherence to a timeline

Conclusion of a feasibility study

A sound plan for public relations & communication

And finally....  
**Contagious enthusiasm about your campaign's goals and objectives throughout the organization**

# Further Reading



- ▶ **Hank Rosso's Achieving Excellence in Fund Raising**, second ed. *Henry A. Rosso and Associates* - Jossey-Bass Publishing (Specifically Chapter 11)
- ▶ **Leading Change**, *John P. Kotter* - Harvard Business Review Press

Questions?

Scott S. Trudell, MSM

[Scott.S.Trudell@icloud.com](mailto:Scott.S.Trudell@icloud.com)

Please feel free to contact me with any questions.

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