

# **Trap Shoot or Crap Shoot? Assessing Your Fundraising Special Events**

Southwest Colorado Rural Philanthropy Days  
September 13, 2018



**Why  
Assess  
Your**

**Special Events???**

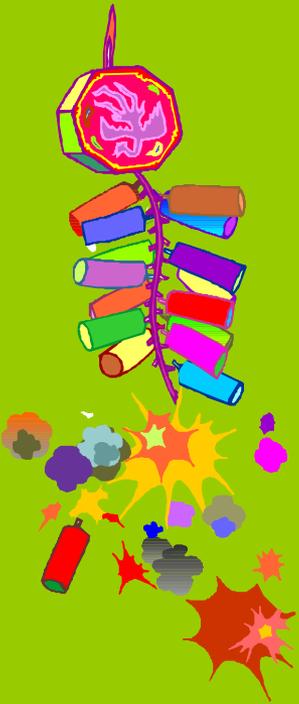
# **Top Reasons...**

## **...for disappointing results**

- ✓ **"Didn't have enough staff and/or volunteers to do it successfully."**
- ✓ **"Too much work for the amount of money and/or publicity it brought in."**
- ✓ **"We needed more expertise to sponsor a successful event."**

# Top Reasons...

...for not engaging in special events



- ✓ “Don't have enough staff and/or volunteers to do it successfully.”
- ✓ “Don't have the expertise needed to sponsor a successful event.”

# **Top Reasons...**

**...that an event is considered successful**

- ✓ **It makes significant amounts of money.**
- ✓ **It has a high ticket-price structure.**
- ✓ **Tickets are pre-sold.**
- ✓ **The event is deliberately targeted to a well-defined market.**
- ✓ **The event promotes and allows for community involvement and continuing support.**
- ✓ **The event is carefully planned and executed to the last detail.**

# Top Reasons...

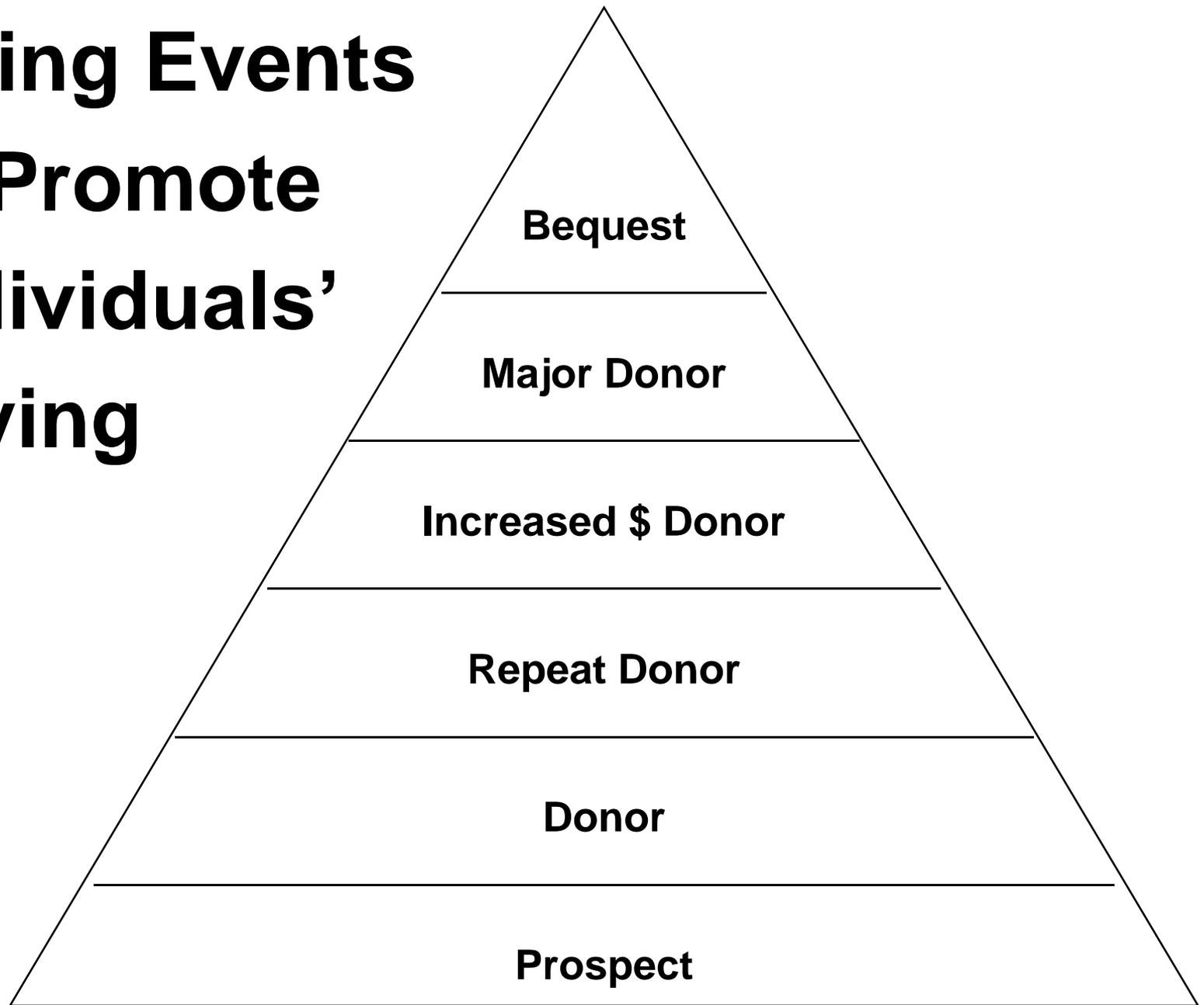
**...that a fundraising benefit is anything but a benefit:**

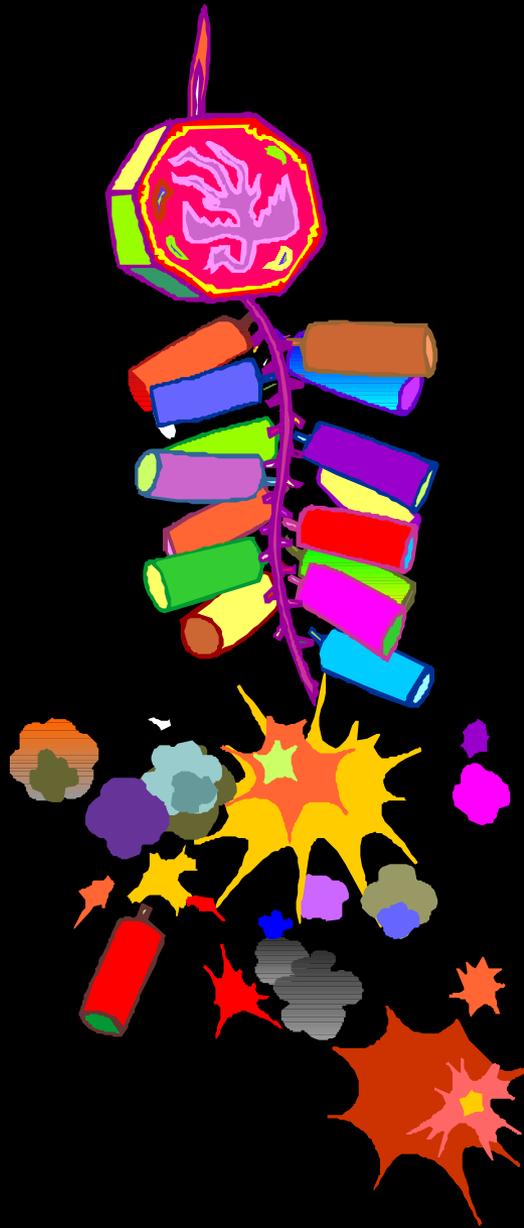
- ✓ **It does not make money.**
- ✓ **It fails to make new friends and/or fails to provide follow-up resource development opportunities.**
- ✓ **It diverts attention from and interferes with other fundraising efforts.**
- ✓ **Volunteers and staff fail to communicate effectively.**
- ✓ **It fails to secure enough underwriting to reduce expenses.**
- ✓ **It is marred by avoidable mistakes and poor participation.**

**The C.A.T.E. Formula**  
**measures all fundraising activity**  
**against the following criteria:**

- ✓ ***COST – total investment, including staff time***
- ✓ ***AMOUNT – net amount of money raised***
- ✓ ***TIME – number of days between the decision to implement and actually having the money***
- ✓ ***EFFORT – number of people and hours involved***

# Using Events to Promote Individuals' Giving





**Where  
Do We  
Start?!?**

***Assessment!***

# Self-Assessment Questionnaire

**Initial Inquiry: If the answer to any of the following questions is “no,” the organization likely should abort its effort to create and present the event.**

- |  |     |    |
|--|-----|----|
| • Do we have a chairperson who is qualified and will work hard?                              | YES | NO |
| • Do we have volunteers who are organized and ready to help?                                 | YES | NO |
| • Do we have an active, dedicated and supportive board?                                      | YES | NO |
| • Do we have enough time for the volunteers to do a thorough job?                            | YES | NO |
| • Do we have adequate staff support?   | YES | NO |
| • Does our organization has an up-to-date mailing/invitation list?                           | YES | NO |
| • Are we well recognized in the community and/or among targeted event attendees?             | YES | NO |
| • Do we have enough potential sponsors and attendees to make a strong profit?                | YES | NO |
| • Is the planned event the only request for funds we will be making at this time?            | YES | NO |
| • Do we have a way to follow up with attendees so further benefit can be realized over time? | YES | NO |

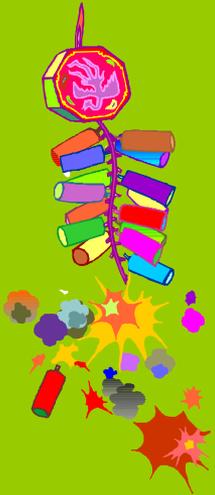
# Self-Assessment Questionnaire

## Second-Level Inquiry

- How much money do we need/want to raise? \$ \_\_\_\_\_
- Have we developed a reasonable, defensible and exacting budget? YES NO
- How likely is it that this event will raise this amount: VERY SOMEWHAT NOT
- Have we researched the market for what will work? YES NO
- Have we researched what is “in” regarding special events? YES NO
- Does this event fit within our understanding of what will work? YES NO
- Have we checked out the competition for the same kind of event? YES NO
- Does the timing make sense? YES NO
- Will this event be ruined by inclement weather? YES NO
- If yes, are we willing to take the risk of implement weather? YES NO

# Using the Event-Ability Quiz





**Successful event planners  
will tell you that –  
to justify staff and volunteer effort,  
out-of-pocket expense and  
the other necessary resources  
required to produce successful  
benefit events –  
you generally should net at least  
70 percent after expenses.**

**In other words,  
every \$10 in gross income  
is split between \$3 for expenses and \$7 for profit.**



***Thank you***  
**for your participation**  
**in today's session!**