



## Managing fundraising events

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# Welcome from the Benefact Group

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An international group of financial services businesses,  
that **gives** all available profits to charities and good causes.



# About the Benefact Group



The UK's  
**4<sup>th</sup> largest**  
corporate donor

Our common purpose is to **give** all available profits to good causes



# Movement For Good

Launched in 2019 with smaller and larger grants

Supported thousands of charities across the UK

2022 Movement for Good awards are now open

This year we are donating more than **£1 million**



[Movementforgood.com](https://www.movementforgood.com)



# Fundraising support from the Benefact Group



## Fundraising Resources

We know that raising those all-important funds for your charity isn't always easy – it requires continual effort and investment. That's why we want to offer practical support and guidance to help you fundraise successfully. Whether you are a volunteer, charity CEO, or seasoned professional fundraiser, we hope our resources will help make your charity's strategy simpler and more successful.

[benefactgroup.com/fundraising-resources](https://benefactgroup.com/fundraising-resources)

# Some thoughts on fundraising events...

We touch a variety of fundraising events through our employee giving programme and charity partnerships



 THE PRINCE'S FOUNDATION

CAROL CONCERT 2021

Wednesday 15th December at 18:00  
Doors open 17:15

Tickets: £10 (advance bookings only)

St Paul's Knightsbridge  
32a Wilton Place  
London  
SW1X 8SH

Supported by

 ecclesiastical



# Our colleagues organise and take part in a range of fundraising events...



Through our MyGiving programme, we have insights on the type of fundraising events happening in our employee community

The most popular fundraising events we've seen this year are:

## 1. Sports events

### Including:

- Football match
- Rugby match
- Three hour spin-a-thon
- Golf day
- Marathons
- Tough mudder races
- Abseils
- ... and Run2Paris – four days of running from London to Paris!

## 2. Cake sales and raffles



A tried and tested fundraiser in the office!

## 3. Garden party's

- Picnics in the park and garden parties held by colleagues in short notice to raise money for Ukrainian appeals



**Over to Layla...**





**Loyal supporters are a must  
have for long term sustainable  
core income and sometimes we  
can engage them through an  
event**



# Great events leave you wanting more!



# Hard work behind the scenes

## Successful events fundraising meets its objectives



# A few thoughts



# Ask yourself?

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- ▶ Is events the right avenue for us?
- ▶ Can we afford it?
- ▶ Why are we doing it?
- ▶ What is our objective?
- ▶ Is this the only way?
- ▶ Can we do this online instead?
- ▶ Will our audience spend money under the current economic climate?
- ▶ What about COVID-19 rules and our audience?

# Options

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- ▶ Can we have all costs upfront for our audience saving them more expenses at the event?
- ▶ Can we get the event sponsored?
- ▶ Can we have venue or food and drink pro bono?
- ▶ Can we build a loyal volunteer base?
- ▶ WHY are we doing this and WHY hold an event?

# What is Events Fundraising

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A fundraiser is an event or campaign whose primary purpose is to raise money for a cause, charity or non-profit organisations (Wiki).

Organising events as a means of fundraising can be a great way to involve an array of different people and the community as a whole. It can raise awareness for your cause in a fun way, reaching new audiences and a wider potential new supporter base. (ICFM)

# Fundraising Mix

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- ▶ **Individual (Major Donors)**
- ▶ **Community (Smaller donations)**
- ▶ **Companies (Donation and Sponsorship)**
- ▶ Trusts and foundations
- ▶ **National lottery**
- ▶ Government
- ▶ **EU (Brexit effect)**
- ▶ **Events**
- ▶ **Social Media**
- ▶ Just giving & Crowd funding





# Developing a Fundraising Mix

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## Community supporters and Events help:

- ▶ diversify our fundraising
- ▶ **ensure that we have durable and reliable sources of income to take us into the future**
- ▶ developing our fundraising mix and be more sustainable
- ▶ **reduce the risk of having too much funding concentrated in one source**
- ▶ **Help with core funding**

# Purpose of events fundraising

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- ▶ **primary purpose is to raise money for a cause**
- ▶ a great way to involve an array of different people and the community as a whole
- ▶ raising awareness
- ▶ **help with sector/client recruitment**
- ▶ can raise awareness for your cause in a fun way
- ▶ create loyal supporter base
- ▶ **reaching new audiences and a wider potential new supporter base. (ICFM)**

# Things to think about

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- ▶ **Where the special events programme and/or community events fits in your overall strategic direction and fundraising strategy**
- ▶ Importance of clear **objectives**
- ▶ **Brief over view of SWOT and PEST**
- ▶ Timing of key activities for the specific events

# Different types of events

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## Special events (large, medium and small scale)

- ▶ Ball
- ▶ Auction
- ▶ Car boot sale
- ▶ Community events
- ▶ School Fair
- ▶ Party
- ▶ Festival
- ▶ Concert
- ▶ Coffee mornings

## Sports events

- ▶ Marathon
- ▶ Golf tournament
- ▶ 5k runs

## Conferences

## Online events via social media

# Online community

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- ▶ Importance of Social media
- ▶ Facebook
- ▶ Twitter
- ▶ Instagram
- ▶ Online donation tools
- ▶ just giving
- ▶ Crowd Funding

# Who is your audience?

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Remember audience and beneficiaries are usually NOT the same



The most important thing to remember is you must know your audience.

Lewis Howes

QuoteAddicts.com

# Do you have more than one type?

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Know yourself - and know your audience.  
(Tennessee Ernie Ford)

[izquotes.com](http://izquotes.com)

# Audience

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- ▶ **Who are your audience(s)?**
- ▶ What are their expectations?
- ▶ **Where are they?**
- ▶ How far will they travel?
- ▶ **What are their needs and fears?  
£, status, ego, physical**
- ▶ **What will stop them from coming?**
- ▶ How do these effect service and marketing?
- ▶ **What about secondary audiences trustees, press?**

# Audience segmentation

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## Supporters

- ▶ Region
- ▶ Age
- ▶ Interest
- ▶ Commitment
- ▶ Frequency
- ▶ Disposable income
- ▶ Communication style

## Volunteers

- ▶ Type of volunteer
- ▶ Proactive Event organiser
- ▶ Reactive to existing events
- ▶ Frequency
- ▶ Age
- ▶ Interest

# Key messages and USP

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# Key messages and USP

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- ▶ Key messages – the right message for the right audience
- ▶ Ensure your overall message is consistent



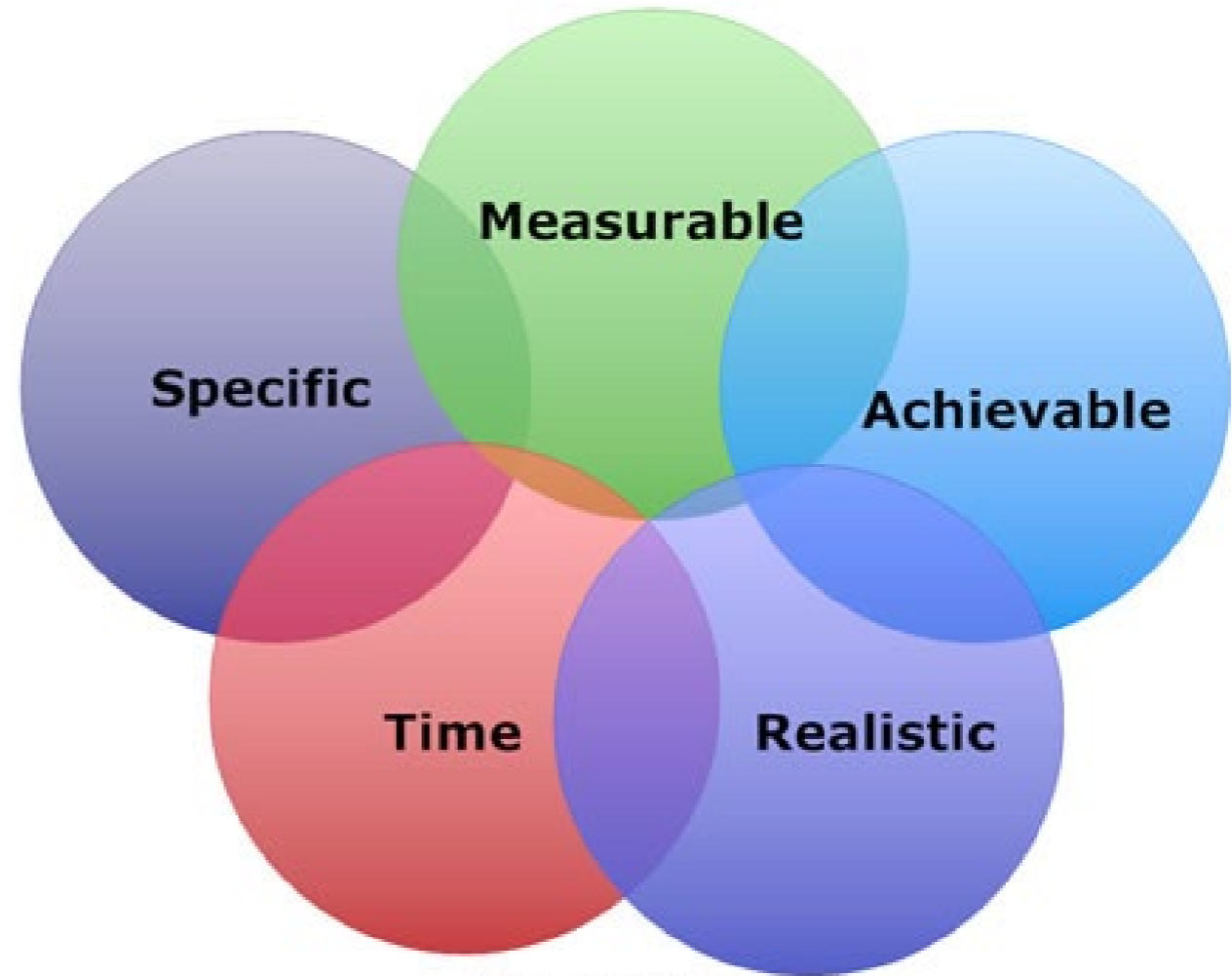
# Set Objectives

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- ▶ Set objectives.. What do you want and why are you doing it
- ▶ Is it to raise awareness, improve your brand, raise funds? Recruit a new audience?



# SMART





# Objectives (SMART)

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## ▶ **Specific - Why are you doing it?**

- Outcomes e.g. publicity, fundraising, networking, training/education, consultation, information sharing

## ▶ **Measurable - Quantity**

## ▶ **Achievable - can it be done**

## ▶ **Realistic - do we have the resources and what results can we realistically expect**

## ▶ **Time bound - by when and how long do we need**

## ▶ **Know the priority of your objectives**

# Purpose of objectives

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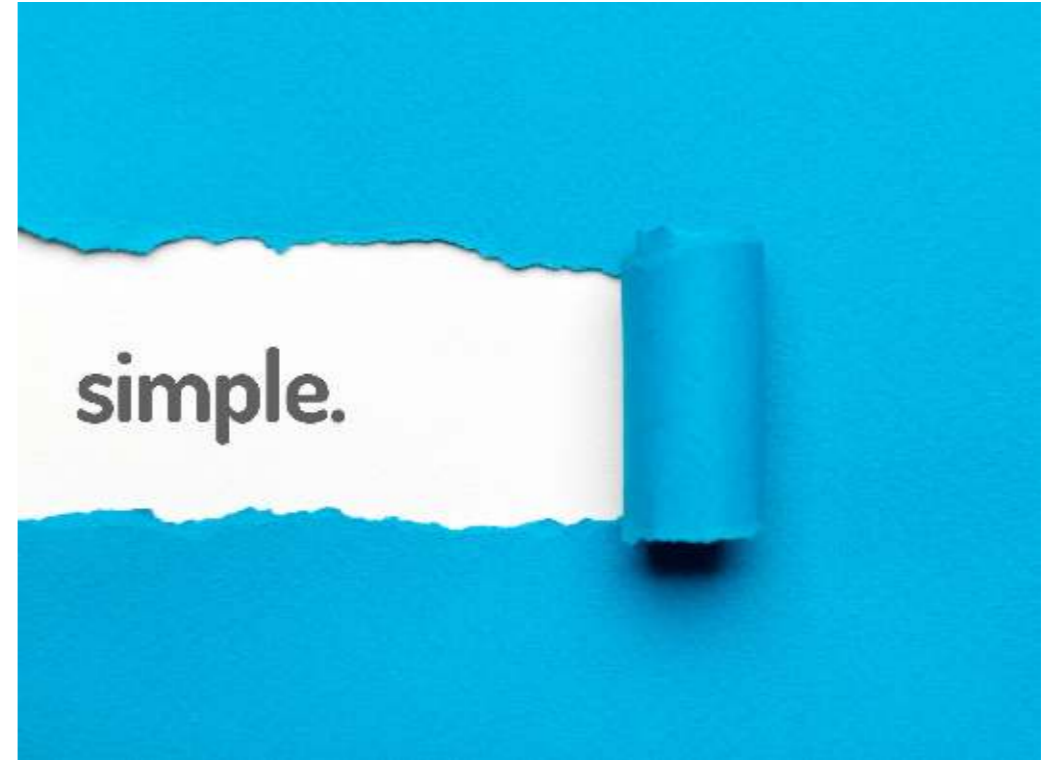
- ▶ **Focus**
- ▶ Prevent drift
- ▶ **Collaborative working**
- ▶ Delegation
- ▶ **Resource identification**
- ▶ Communications
- ▶ **Success criteria**
- ▶ Evaluation



# Simplify objectives

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- ▶ **Make your objective simple and easy to understand**
- ▶ If you have more than one objective prioritize them into primary and secondary objectives
- ▶ **It is easy to lose sight of your objective so before making ANY decisions come back to your objective**



# Beginning with the end in mind!

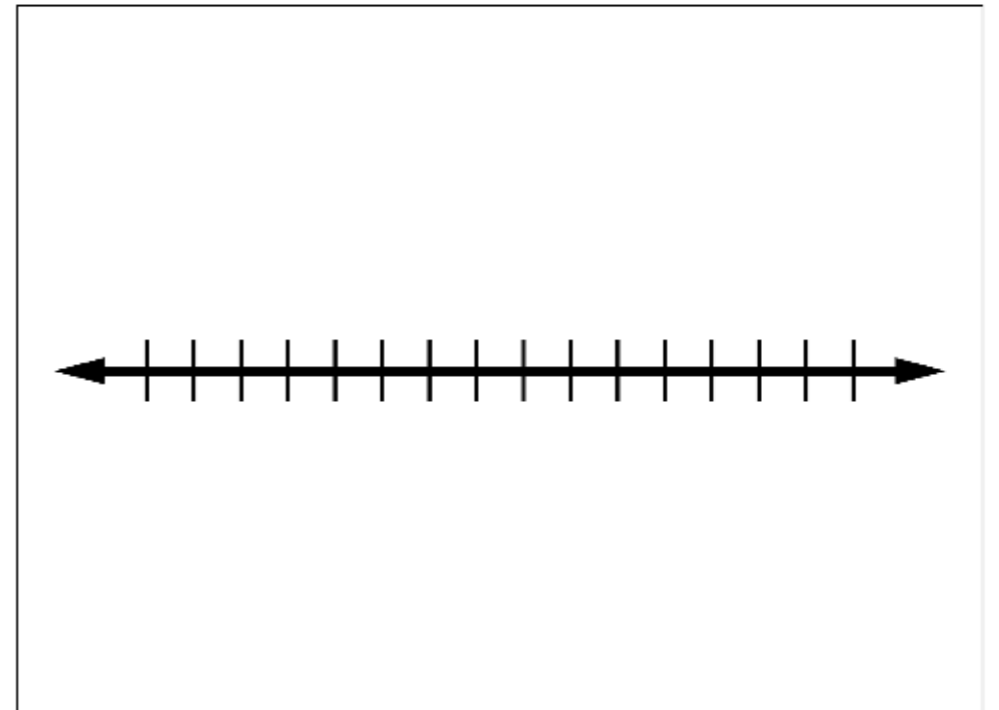
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- ▶ **What you are intending to do and why?**
- ▶ What is the motivating factor for doing it?
- ▶ **Check that your objective fits with your strategic plan and overall aims**
- ▶ Does your objective fit with your skills and experience?
- ▶ **Is it realistic given likely time and budget constraints?**

# Timeline

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- ▶ What do you want to achieve by when
- ▶ **What do you need to do by when**
- ▶ What needs to be done by when



# Importance of cross team work

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**Coordinating event and community activity  
internally and externally**



# 4 stage approach

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- ▶ **Pre-planning – 6 months**
- ▶ **Organising – 5 to 1 month**
- ▶ **Final preparation – 1 week before**
- ▶ **Post event**

# Get creative

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- ▶ **Meets your objective(s)**
- ▶ **Meets audience needs/fears**
- ▶ **Fit with overall charity purpose**
- ▶ **Breaks the boredom barrier (USP)**





# Pre-planning

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# Team/steering group approach

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- ▶ **Identify opportunities**
- ▶ Pre-empt clashes
- ▶ **Gain knowledge**
- ▶ Delegation
- ▶ **Communications**
- ▶ Clear roles



# Creative prompts

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- ▶ **Themes** – seasons, exhibitions, national weeks
- ▶ **Gaps** – in current offering
- ▶ **Trends** – tv progs, music, theatre, sports etc.
- ▶ **Competitors**
- ▶ **Other; letters, colours, countries**
- ▶ **Working with community and volunteer groups**

# Income Vs Expenditure

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- ▶ Target
- ▶ Expenditure
- ▶ Available Resources
- ▶ Timing
- ▶ **Is it realistic and achievable?**



# Choosing a date – considerations

- ▶ **The day, season and likely weather**
- ▶ Clashes with other events with; the same target audience, school holidays and half terms, national events i.e. cup final, grand national, election days
- ▶ **Time to open and close the event allowing for set up, travelling time and public transport links, qualifying heats, need for daylight etc**
- ▶ Availability of the venue
- ▶ **Availability of entertainment, celebrity or speaker**



# Choosing a venue

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- ▶ **Meet objectives**
- ▶ Audience fit
- ▶ **Travel considerations**
- ▶ Speaker, entertainment, guest and sponsor requirements
- ▶ **Venue finder websites/contacts**
- ▶ Site visit/venue database
- ▶ **Somewhere that is interesting/unique/free!**



# More things to think about

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- ▶ Event Outline and list of what you need
- ▶ **Providing the organisation awareness of any legal legal/VAT issues related to community and event**
- ▶ Identify key milestones for monitoring and evaluating the events and community reach
- ▶ Research and research sources
- ▶ **List all the planning activities**
- ▶ **Plan when to communicate to different stakeholders**

# Volunteers

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- ▶ **Glue that hold community fundraising together**
- ▶ Effective Volunteer management and programme is an imperative part of a for successful community an events fundraising strategy
- ▶ Volunteer **praise and championing**
- ▶ Volunteer **recruitment**
- ▶ Loyal volunteer supporter base
- ▶ Delegation and Trust



# Volunteers

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- ▶ **Trustees/staff/volunteers**
- ▶ **Time commitment**
- ▶ **Expertise**
- ▶ **Define roles/responsibilities**
- ▶ **Recruitment** Scouts, cadets etc, references
- ▶ **Legal** data protection, DBS
- ▶ **Welfare** health and safety

# Risk Analysis and contingency

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**What if?**



# Set Budget

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- ▶ Incomes and expenditures
- ▶ Cost based/Historical plus
- ▶ Contingency
- ▶ Realistic - quotes
- ▶ Best/worst and likely scenarios
- ▶ Realistic sponsorship
- ▶ Return on investment

# Analysis – ROI

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**Also called fundraising ratio, can help to decide whether to proceed or not with your event**

**Net income**

**Total costs**

**Income £500 costs £50**

**Income £12,000 costs £3,000**

**Income £10,000 costs £10,000**

**Income £5000 costs £3000**

# Analysis – ROI

	A	B	
<b>Fixed Costs</b>		<b>Fixed Costs</b>	
Venue hire	900	Stewarding costs	900
AV Equip	150	Safety barriers	1000
Advertising	300	Chip timing	2000
Entertainment	150	Photography	200
Speaker	1500	PA equipment	400
Photography	200	Advertising	1000
Invitations	300	Portaloos	500
		<b>Variable costs</b>	<b>Per Person</b>
<b>Variable costs</b>		Walker support/sponsorship packs	£3
Lunch £15 pp	1500	Refreshments	£5
Wine £1.50 pp	150	T- shirt	£2
Thank you cards 50ppp	50	Thank you cards	50p
Fixed Income			
Sponsorship	0	Fixed Income	
		Sponsorship	1000
<b>Variable Income</b>			
Ticket sales £40 pp		Variable Income	
Raffle £1 pp		Sponsorship	£200 pp
		Raffle £1 pp	

# Communications plan

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- ▶ **By audience**
- ▶ **Key messages for different stages of event timeline**
- ▶ **Identify methods**
- ▶ **Frequency of communications**
- ▶ **Keep within budget**
- ▶ **On-going communications plan**

# Communication Channels

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## **Local/National media**

- ▶ Radio and television interviews
- ▶ Journals and magazines
- ▶ Club mailing lists

## **Social media**

- ▶ Website partners
- ▶ Google Ads
- ▶ Facebook
- ▶ You tube etc
- ▶ Blogs and review sites
- ▶ Email/SMS/Text giving
- ▶ Twitter

## **Public Relations**

- ▶ Photo calls
- ▶ Stunts/Flash mob
- ▶ Competitions
- ▶ Communitynewswire.org
- ▶ Mediatrust.org

## **Personal selling**

- ▶ Trustees/word of mouth

## **Internal staff**

## **volunteers**

## **External stakeholders**

## **Sponsors**

## **Event participants**

# Communications plan

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Message objective	Audience	Key Messages	Method	Timing	Repeat/Pulse



# Participant care

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- ▶ **Data management** - payment processes and ticketing
- ▶ **Sponsorship** - fees, contracts, benefits
- ▶ **Special equipment** - health and safety
- ▶ **Communications plan to all various audiences**

# Organising

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- 1. Start compiling a managers manual**
2. Get quotes - venue, food, transport. Agree terms deposit, final numbers and payment
- 3. Liaison with officials – police, fire, 1st aid, Licenses and permissions, first aid and insurance,**
4. Equipment hire – PA, toilets, marquee, lighting, communications
- 5. Research and agree entertainment, celebs, sponsors, transport**

# More Organising

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**6. Deposits and contracts**

7. Participant care

**8. Ticket and data processing**

9. Marketing and communications

**10. Risk assessment; hazards & actions**

11. Site plan; signage, entrances & exits

**12. Recruit stewards/volunteers**

**13. Emergency kit, first aid**

14. Contingency plans

15. Timetable of events

# Existing Evaluation process

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- ▶ Monitor your objectives, suggest improvements for next time
- ▶ Formal and informal feedback



# Evaluation

# Extra information

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# Legal implications

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- ▶ **Licence and permissions; Local Authority, countryside rights of way act, emergency services**
- ▶ **Equal access and equalities**
- ▶ **Environmental impact**
- ▶ **Health and safety**
- ▶ **Travel regulations**
- ▶ **Food hygiene**
- ▶ **Written agreement for corporates**
- ▶ **Merchandise and trading**
- ▶ **Health and safety, risk assessments**
- ▶ **DBS (CRB) checks for volunteers**
- ▶ **Participant expenses and equipment**
- ▶ **Sponsorship; refunds, costs of trip**
- ▶ **Legal consents in advance**
- ▶ **Lotteries/raffles**

# Contractual considerations

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- ▶ **Clarify what exactly is included .. Assume nothing!**
- ▶ Equipment use – yours & there's
- ▶ **Shared areas/sole use**
- ▶ Signage
- ▶ **Experience of main contact and manager on the day**
- ▶ Request copies of certificates, insurance and risk assessments
- ▶ **Review contract don't just sign!**



# Confirmations and communications

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- ▶ Confirmations with suppliers/speakers/celebs etc.
- ▶ Final timetable, briefings & phone numbers staff, volunteers, media, celebs/speakers
- ▶ Info packs – press/VIPs
- ▶ Special publications ready
- ▶ Interviews/photos arranged



# What can you offer a sponsor?

- ▶ Celebrities
- ▶ PR
- ▶ Target demographic/test marketing/product placement
- ▶ Sales revenue
- ▶ Advertising platform
- ▶ Consortium
- ▶ Online partnership
- ▶ CSR and pro-bono
- ▶ Synergy
- ▶ Membership/access to members
- ▶ Employee retention/motivation/recruitment
- ▶ Corporate Hospitality
- ▶ Brand





**WORK  
HARD  
BUT REMEMBER TO  
HAVE FUN  
!!**



**Thank you  
for listening**

**[www.benefactgroup.com/fundraising](http://www.benefactgroup.com/fundraising)**



BENEFACT  
GROUP

dsc  
directory of social change

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