Project Management for Fundraising Events
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What you will learn today...

How to apply project management processes, tips & tricks to planning your next successful fundraising event.
Agenda

- Reflection: Events You’ve Attended
- The 6 I’s of Project Managing Fundraising Events
  - Step 1 - Identify objective-based event outcome(s)
  - Step 2 - Investigate ways to accomplish outcomes(s)
  - Step 3 - Initiate the use of a project plan
  - Step 4 - Imagine your attendance
  - Step 5 - Implement and execute the project plan
  - Step 6 - Inspect and measure outcome(s)
- Summary & Questions
Think about the last fundraising event you attended...

- What did you like about the event?
- What did it look like?
- How did it make you feel?
- Did you enjoy yourself?
- Did you donate at the event?
- Did you tell others about it?
- Would you attend another event that organization hosted?

Step 1
Identify objective-based event outcome(s)

- Specific and measurable
- Written down (1 to 2 sentences)
- Agreed upon

Format:
- *(What you will do)* to raise a goal of *(goal amount in dollars)* and *(secondary goal, if any)*.

Examples:
- Host a formal benefit dinner to raise a goal of $5,000 and grow our donor community by at least 20 people.
- Host a fun run to raise $2,500 and increase awareness of at least 120 teens about being active and staying healthy.
Step 2
Investigate ways to accomplish outcomes(s)

1. Brainstorm Ideas
   - Pros and cons from last event or other events
   - Try something new: event ideas

2. Research Best Ideas
   - Date (consider: day of the week, near holiday, weather, etc.)
   - Venue (cost via quotes, availability, & contingency plan)
   - Sponsor interest & volunteer availability
   - Compare costs to proposed budget

3. Communicate Findings & Event Proposal to Stakeholder(s)

4. Decide on Event Plan

PM Tip: Any ideas you consider should clearly accomplish objectives. Consider the possibility that hosting an event may not be the best way to accomplish your outcomes.

Step 3
Initiate the use of a project plan

What you need:
- Event Plan (Step 1 & 2)
- Event “owners”-staff, volunteers & contacts
- Budget-What is it? Who will manage it?
- Decision-making process-What is it?
- Timeline-usually venue driven
- Tracking tool
  - Notebook, MS Excel, other software programs (MS Project $$$, DreamTeam $$, Basecamp $, Google Drive (Free w/ Gmail account))
- Sample Event Project Plan

PM Tip: Create a separate “Day of” Project Plan that you can print off and take with you to the event along with task owner & venue contact information.
Step 4
Imagine your attendance

- Before the event:
  - Invitation & Registration/R.S.V.P. Process
  - Event Schedule (& Contingency Plan)
  - Parking
  - Attire (Casual, Business Casual, Formal, etc.)
  - Ask yourself: What would you need to know?

- Day of the event:
  - Where to go?
  - What to do?
  - Always:
    - Event Schedule
    - Biological needs: restrooms, water, food logistics
  - Ask yourself: Would you enjoy the event? Would you donate?

PM Tip: More is not necessarily more. It is okay, better even, to have a small number of high quality items vs. a large number of poor-quality items.
Step 5
Implement and execute the project plan

- Kick off meeting
  - Share the objective-based outcomes and event plan

- Set up regular task owners’ meetings
  - Agenda with topics that will be discussed
  - Track action items and “owners”
  - Set due dates
  - Track decisions (in Project Plan)

- Keep task owners on task between meetings

- Keep the Project Plan up-to-date

- Send regular event status updates to Stakeholders

PM Tip: Review action items, due dates and owners at the end of every task owners meeting.
Step 6
Inspect and measure outcomes

- Did you accomplish your objective-based outcome(s)?
  - Donations
  - Any secondary objectives

- Solicit attendee feedback
  - Formally or informally

- Set-up an event debrief for task owners and Stakeholders
  - What did we do well?
  - Where is there room for improvement?
  - Would you do it again?
  - Document it
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Thank you!

Questions or Project Plan Template
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