

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 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?



Photo courtesy of http://ashleywelton.com/wp-content/uploads/2013/05/miniskirtinja_copywriting_lemonades_tand.jpg



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)

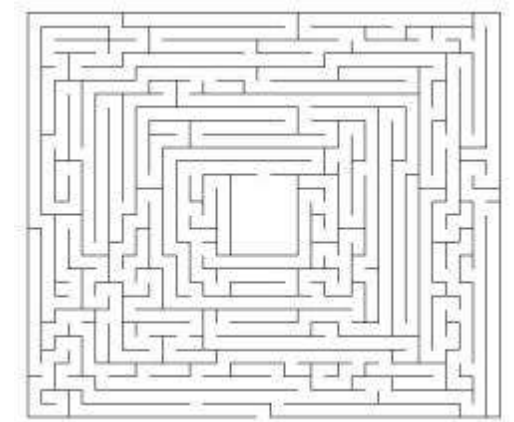


1. Brainstorm Ideas

- 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/RSVP 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



+ Summary & Questions



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- Thank you!

- Questions or Project Plan Template
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