



Event Fundraising for Heritage Organisations



Introducing



To help you enjoy your day



#loftweets

@givingtoheritag



Declaration

All information is given by the Institute of Fundraising as current best practice, or is existing research which is credited.

However, this is not a substitute for professional legal or financial advice.

Learning Outcomes:

- Construct a business case for your Heritage event
- Develop and use your own successful event project plan for your Heritage organisation
- Understand and be able to differentiate between events fundraising and other fundraising techniques our Heritage organisation may be involved in
- Evaluate and review your Heritage event
- Understand the importance of team-working to aid event success for your Heritage organisation



“ Many people fail in life, not for lack of ability or brains or even courage, but simply because they have never organised their energies around a goal.”

Elbert Hubbard, American Philanthropist

Building the Business Case

1. Organisation's fundraising objectives
2. Event objectives
3. Description of Event Proposed
4. 360 degree
5. Key benefits to be realised
6. Key risks
7. Stakeholder analysis & target audience
8. Critical success factors
9. Budgets
10. Marketing & advertising
11. The team – staff vs. volunteers/friends group

Building the Business Case

1 - 2. Overall fundraising objectives link to your event objectives

Create S.M.A.R.T. Goals



Aims and Objectives

Event aim/benefit	Output	Output indicator	Output target	Method of collecting data	Person responsible
Raise funds	Ticket sales	Number of tickets sold	300	Ticket stub count	Amy
		Number of regular donors signed up	50	Forms collected	James
Aim	Outcome	Outcome Indicator	Outcome Target	Method of collecting data	Person responsible
More engaged volunteers	Increased sense of commitment and responsibility	Increased attendance at meetings	90% attendance	Minutes of meetings	Key worker
		Better time keeping at meetings	On time arrival and departure	Staff feedback	Key worker
		Increased number of introductions facilitated	20 per year	No of relationships recorded on RE	Key worker

Session 1

SELECTING AN EVENT

What event for your Heritage organisation?

SUMMER
EVENTS



Excellent fundraising *for a better world*

GIVING TO
HERITAGE 
TRAINING FOR FUNDRAISING

Institute of
Fundraising

Fun – raising: The F Factors

F Factor

- Farce
- Family & friends
- Fight
- Fear
- Fantasy & a flutter
- Fame
- Food
- Fashion
- Fitness

Example

- Bed Push
- Garden Party
- Jousting/Heritage Quiz Night
- Abseil /Trek
- Race or Casino Night
- Charity Performance
- Dinner & Dance
- Fashion Show/Latest Craze
- Run/Walk

Organise your own event

Organising an event is a great way to fundraise for Action for Children. Here are a few of our top ideas.

Key

Minimum number of people needed:

0–10 people 😊

11–25 people 😊 😊

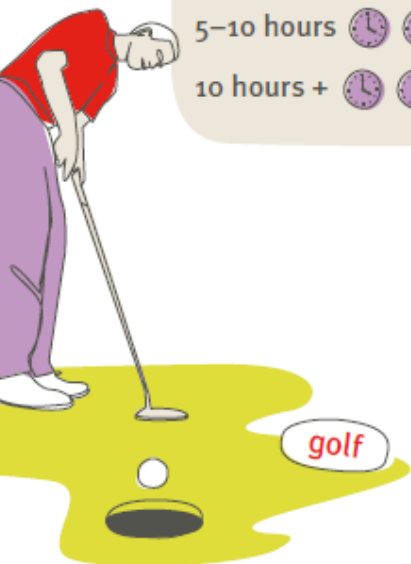
25 people + 😊 😊 😊

Minimum preparation time needed:

0–5 hours 🕒

5–10 hours 🕒 🕒

10 hours + 🕒 🕒 🕒



£0–£50

1. Home baking sale



Everyone loves a homemade cake so get baking and brighten everyone's day!

2. Guess the baby



Ask your colleagues to bring in photographs of themselves as babies. Put these on the wall and ask people to match the grown ups to the babies.

3. Guess how many...



Whether you want to guess how many sweets in a jar, beans in a tin or smarties in a tube, this fundraiser is popular with adults and children alike.

£50–£200

1. Five-a-side



Get active with a five-a-side football, netball or hockey tournament.

2. Be my guest



Organise your own fundraising event and charge an entry fee. You could host a dinner party, barbeque, garden party or club night – the possibilities are endless!

3. Dress down day



Ditch the suits for a more relaxed day at work.

£200–£500

1. Battle of the bands



Showcase budding talent and have a great night!

2. Donate money instead of wedding/birthday/Christmas gifts



Make your special day count for years to come.

3. Bike ride



Get together with friends for a sponsored bike ride – a great way of getting fit and raising money!

£500+

1. Auction



You can do this either by email or organise your own auction evening. Ask local companies to donate prizes – you'll be surprised at their generosity!

2. Have a ball



Why not arrange a ball – a great way of making substantial amounts of money while having a memorable night.

3. Golf day



Book an attractive golf course and ask local companies to enter a team. This not only raises a lot of money but is also a fantastic networking opportunity.

Target audience



Who are your likely attendees/participants?

Is there a link to your Heritage organisation?

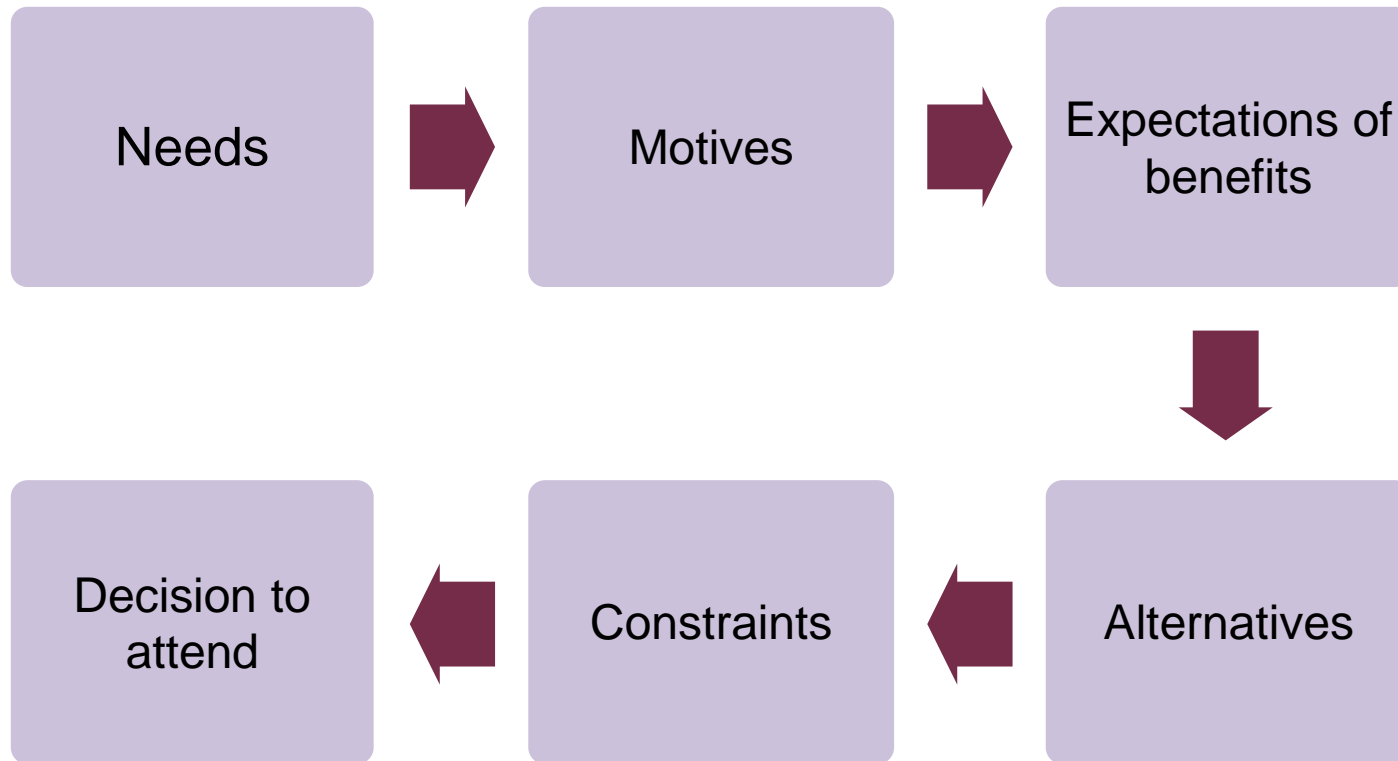
Building the Business Case

3) Description of the event proposed

- Keep your eyes open
- Borrow from other sectors
- Think of income streams

Fundraising with Events

Understanding decision making processes



Session 2

DEVELOPING AN EVENT PLAN

Building the Business Case

4) 360 degree analysis

- What factors may impact (positive or negative)?
- Competitor analysis
 - Direct
 - Indirect
 - Future
- What's been done in the past & what experience/contacts do staff/volunteers have?
- Timescales



Building the Business Case

5) Key benefits to be realised for your Heritage organisation

- Look back to the objectives
- Think about the benefits
- Place a structure around them to build them into the monitoring and evaluating process and bring their value to life

Building the Business Case

5) Key benefits to be realised

Donor conversion/build donor relationships



Building the Business Case

5) Key benefits to be realised

Donor conversion

- Welcome process/ plan of future engagement
- Understand likely future value of donors and future responses and behaviour
- Return On Investment (ROI) vs Relationship Fundraising

Building the Business Case

Differences	Transaction-based Fundraising	Relationship Fundraising
Focus	Soliciting single donations	Donor retention
Key Measures	Immediate ROI, amount of donation, response rate	Lifetime value
Orientation	Urgency of cause	Donor relationship
Time Scale	Short	Long
Customer Service	Little emphasis	Major emphasis

Venue



Compare

Venue	Bob's Bistro	Ed's Bar & Marquee	Jamie's Nightclub
Venue capacity	60	0	120
No. Of guests expected	50	50	50
Costs	£	£	£
Venue Hire	0	1450	500
Staffing costs	0	0	100
Printing	50	50	50
Menus and Place cards	50	50	50
Food	1250	1000	750
Reception drinks	300	300	300
Band	500	500	500
Raffle prizes	100	100	100
Total Estimated Costs	2250	3450	2350
Ticket Price if 40 people attend	£45	£69	£47

Venue Finding Checklist

- Objectives of event in relation to venue
- Critical success factors in relation to the venue
(Does the venue satisfy the above two points)
- Name and contact details, contact person and details
- Site inspection
 - General environment
 - Access for visitors and suppliers
 - Nearest station/airport/etc
 - Access problems
 - Capacity
 - Parking capacity
 - Scale plan available with measurements incl. door widths
 - Power points
 - Lighting options
 - Temperature control
 - Fire procedures
 - Support area capacity
 - Kitchen capacity
- General impressions

Contracts

- Terms and conditions
- Service agreements
- Check for mistakes – it is too easy to make a contract void
- Be fully aware of what you are agreeing to and expecting
- Read with a fine tooth comb and preferably a lawyer if complex!

Building the Business Case

6) Key risks

Undertake a risk assessment
and keep a risk register



Building the Business Case

8) Critical Success Factors

- Elements that are necessary to achieve a successful event.
- Drive forward the strategy



Building the Business Case

9) Budgets

- Preliminary budget

Need to consider income and expenditure and decide in planning stages if event is financially viable



Costs & Income

Costs

- Time
- (Wo)manpower
- ££££

Income

- Sponsorship
- Volunteers
- Ticket sales
- Add-ons

Budget planner for your event

It's a good idea to get all your figures down on paper before starting to plan your event. You may want to use the template below to help you to do this.

Costs	Amount £
Venue	
First aid	
Portaloos	
Printing	
Postage	
Decorations	
PA system	
Entertainment	
Licensing	
Insurance	
Food	
Drink	
Other	
Total costs	

Income	Amount £
Ticket sales	
Donations	
Raffle/prize draw	
Matched funding	
Other	
Total Income	
Estimated donation	

- ▶ Simply take away the costs from the income to see how much your fundraising event might raise.
- ▶ Try to keep costs to a minimum. You may be able to secure many items or services for free, or find a sponsor for your event.
- ▶ As a rule, try not to spend more than 20 per cent of your income on costs.
- ▶ Your local fundraiser will be able to offer advice every step of the way!
- ▶ Action for Children have a range of fundraising materials to help you brand your event, including collection boxes for donations and posters you can tailor to your event.
- ▶ To order materials for your event, contact your local fundraiser or order online at www.actionforchildren.org.uk/takeaction.



Example Budget – Walk (example in handout pack)

Example Sponsored Walk Budget

Income			Expenditure	
Event Sponsorship			Entry Forms (three fold)	£1,300.00
	Company Sponsorship	£5,000.00	Sponsor forms	£550.00
Registration Fees			Posters + Training Diary	£285.00
£12 each	1,500	£18,000.00	Warm up leaflet / map	£150.00
Sponsorship from Walkers			Car stickers	£750.00
	Based on £100 average	£150,000.00	Additional reg forms & Posters	£456.00
Merchandise			Photocopying	£180.00
	Bunny Ears		Walker Numbers	£265.00
	Necklaces		T Shirts - (2,000 @ £2.53 each)	£5,060.00
	Rings		Medals (1,500 @ 71p each)	£1,065.00
	Existing Stock	£3,800.00	Portable Toilets (inc VAT)	£2,820.00
Gift Aid	Based on 56%	£23,520.00	Marketing & Advertising	£200.00
Matched Funding			Marshal Briefing venue hire	£52.00
		£5,000.00	Postage	
			Initial pack (1,500 @ 85p)	£1,275.00
			Pre event chase March & June (2,400 @ 25p)	£600.00
			Post Event chase (1,354 @ 0.25p)	£338.50
			Envelopes and Stationery	
			2,000 Poly bags and 2,854 standard	£135.00
			Paper (7,500 sheets) & Cert Paper	£146.00
			Catering	
			Equipment	£765.00
			Bacon and vegetable burgers, rolls & bananas	£925.00
			Safety	
			St Johns & Police	£450.00
			Venue costs	
			Field	£200.00
			Fencing and Lighting	£100.00
			Marquee hire	£117.50
			Entertainment roadshow (inc VAT)	£1,680.00
			Merchandise	
			Bunny ears, necklaces and rings (inc VAT)	£1,480.00
			Contingency	£500.00
Total		£205,320.00	Total	£21,845.00
			Total Anticipated Profit	£183,475.00

Event Budgets

Budget faux pas

- Ignoring the event objectives
- Guessing at figures
- Failing to identify all the costs
- Being over optimistic about success
- Not having enough capital to kick start the event
- Spending not invoiced / recorded
- Not including VAT

Event Budgets

Preliminary research

- Number of people expected
- Capacity of venue
- Deposits pre-payments required
- Cost of staff
- Quotes
- Entertainment
- Secondary costs (licenses, etc)
- Income sources

Event Budgets

Elements

- Number of attendees
- Income
- Expenditure
- Total costs
- Surplus/deficit
- Budget vs Actual
 - Return on Investment (ROI)

Venue	Bob's Bistro	Ed's Bar & Marquee	Jamie's Nightclub
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No. Of guests expected	50	50	50
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Staffing costs	0	0	100
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Menus and Place cards	50	50	50
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Break

Session 3

MARKETING AND ADVERTISING

Marketing and Advertising

Marketing channels

- 7 Factors of influence



Session 4

MANAGING YOUR TEAM

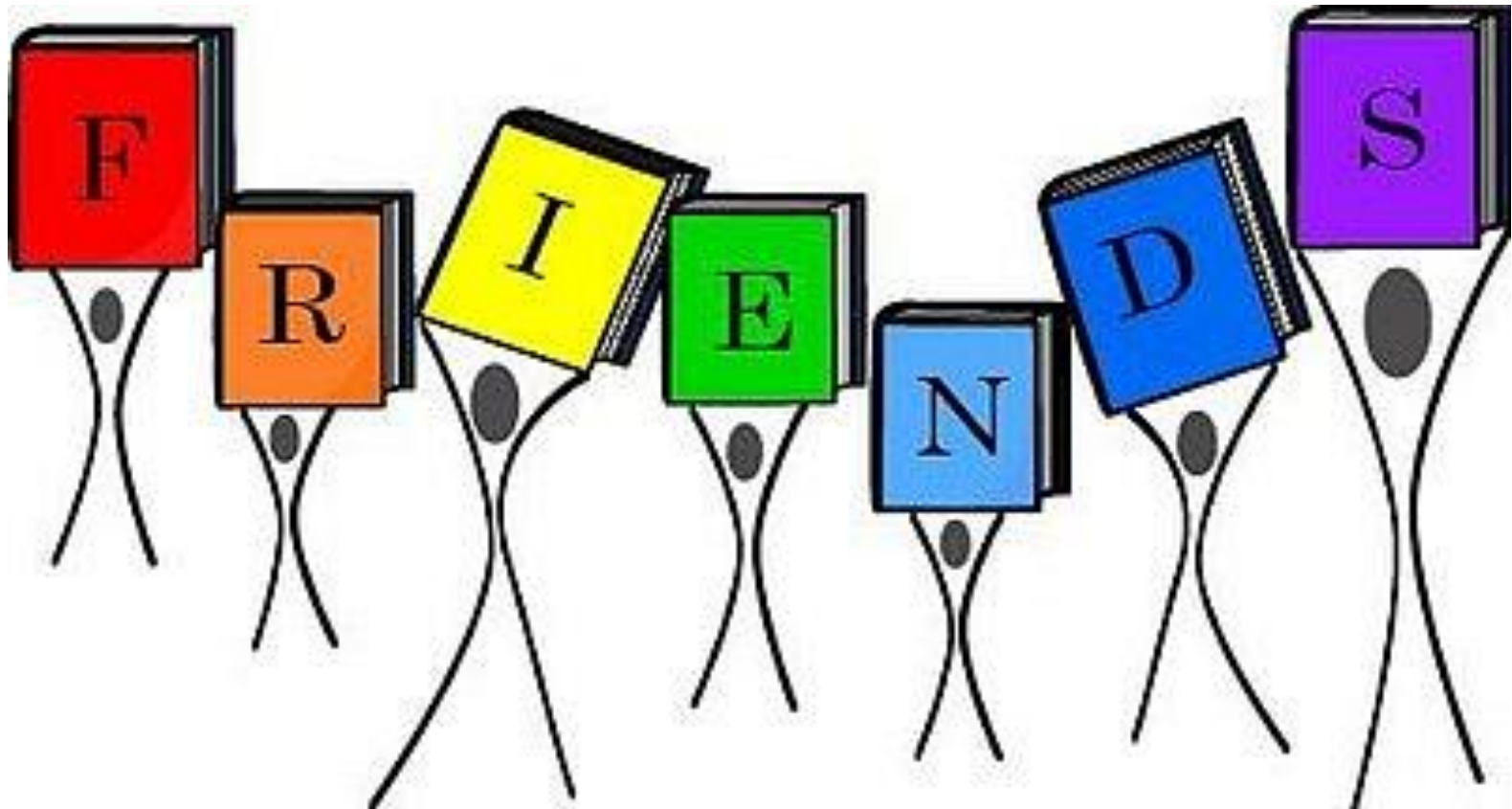
Resourcing

11) The team

- Volunteers or staff
- Roles and responsibilities
- Skill sets & delegation
- Levels of authority
- Briefing
- Prioritising



Friends Groups for your Heritage Organisation



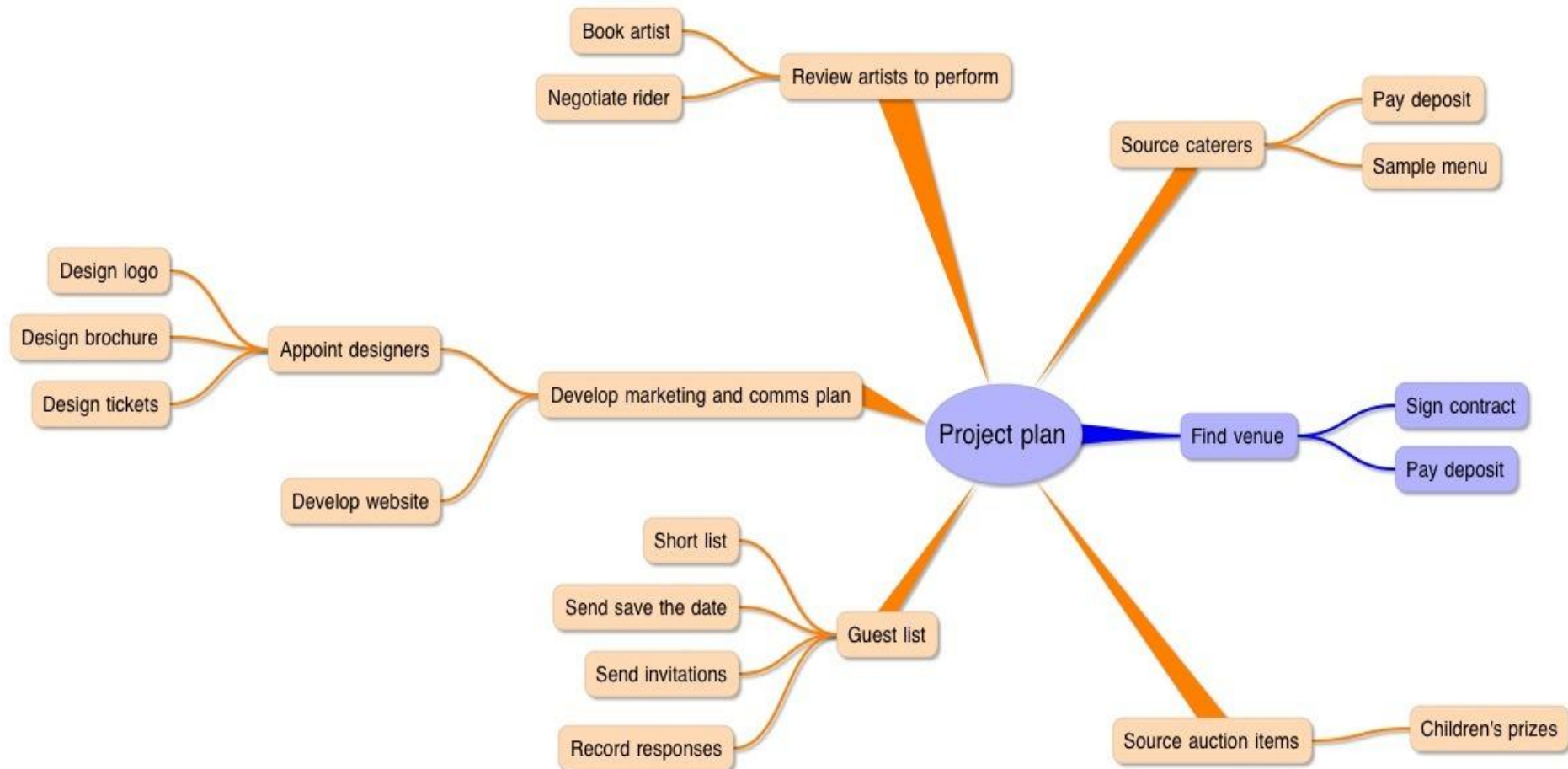
Event Plan

- Create a project plan – include objectives and budgets (confirm any estimates) as well as a timeline. Consider constraints, assumptions & dependencies
- Recruit & manage the team – consider if you need event experience
- Have clear procedures
- Risk assessment/management & contingency planning
- Evaluation

Event Plan

Creating a Project Plan for your Heritage event

- Spider gram everything that needs to be done



Project Management

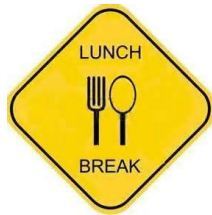
Clear Procedures

- Scheduling of internal & external meetings
 - Setting expectations from the beginning
 - Use RASCI to support this meeting
- Sharing information
 - Cloud databases
 - Weekly updates
 - Refer back to RASCI
 - Encourage two way communication
 - Listen

Event Management

Know your organisation's status, policies and liabilities

- Understand your trading status including VAT status
- Organisation's insurance liability levels
- Disclosure and Barring Service checks (DBS – replaced CRB).
- Lottery/raffle – operating licenses and who can participate
- Trademark use and protection
- Know employee policies – working conditions/ hours/alcohol policy
- Data protection



Lunch

Heritage Event Pitch Presentation



Exercise

In groups discuss an event to present to the panel ensuring you:

- Outline your SMART event objectives but also explain how it would also achieve some of your overall FR objectives
- Describe the event and how it would raise you money
- Why use an event as your fundraising method rather than other ways of raising the money
- What advertising and publicity would you have in your plan and how would you market it pre/ post
- Produce a list of the income and expenditure heading
- Who would be involved in the organising and running of the event and tell the panel how you would manage them

www.institute-of-fundraising.org.uk/guidance/five-minute-fundraiser/



Break

Session 5

ON THE DAY

On site management

Event briefing for staff/volunteers

- Purpose of event, type of visitors, likely numbers
- Opening and closedown times
- Programme, facilities and services, time check
- Parking and access, facilities for disabled people
- Toilets
- Who to report to and arrangements for refreshments
- Emergency contacts, systems and procedures, checking emergency routes and exits are clear
- Maps and keys
- Who to direct media to
- Questions and answers

On site management

- H&S permits
- Venue safety
 - Fire safety is your responsibility
 - Health and safety policy and risk assessment
 - Full emergency and evacuation procedure
 - Entertainment license
 - Alcohol license
- Accessibility
- Traffic and road closure
 - Road Traffic Regulation Act 1994
 - Town Police Clause Act 1847 section 21
- Security Industry Act 2001 (SIA)



On site management

- Copyright, Designs and Patents Act 1988
 - Performing Rights Society (PRS)
 - Phonographic Performance Ltd (PPL)
 - Mechanical Copyright Protection Society
 - Video Performance Ltd License
- Consumer Protection Act 1987



On site management

Event organiser's role

- Walk through
- Wandering
- Communicate
- Check key locations
- Delegate authority and action
- Deal with problems
- Spare FR info/packs etc
- Have risk assessment and insurance documents with you
- Identify and remember
- Work steadily and take breaks
- Be visible

Ensure you have phone numbers of key people, list of attendees as well as staff/vols, kit bag (e.g. card, marker pens, sticky tape, blue tack, scissors, string, drawing pins, etc)



Close Down

- Let the work begin!
- Site break down
 - Watch time constraints
 - Ensure access just as for arrival
 - Ensure staff/volunteer levels remain sufficient
 - Litter team – if necessary

Thanking Supporters

Thank You!

- What is recognition & stewardship
- Why is it important?
- Build a recognition and stewardship plan
- ACT
- Align your donors and your mission
- Make sure you can deliver internally and externally against your plan

Record keeping

Essential to maintain accurate & effective records

- Importance of recording data
- The Data Protection Act 1998



Record keeping

1. Maintaining accurate and effective records

- Importance of recording keeping
- Data Protection Act 1998 detailing the storage of facts and opinions about a person

2. Importance of data

- What it can tell us
- Segmenting
- Record on databases



Useful sections of IoF Code

- Events: including: Charity Challenge Events; Outdoor Fundraising Events in the UK
- Working with Third Parties
- Working with Children
- Handling Donations
- Raffles and Lotteries
- Corporate Partnerships
- Direct Marketing
- Working with Volunteers
- Data protection

Session 6

EVALUATION

Evaluation

What's needed?

- Form
- Think ahead and plan
- Collecting data
 - Your documents and databases
 - Public records of the event
 - Diaries and anecdotal accounts
 - Questionnaires
 - Interviews
 - Written responses to requests for information
 - Mystery guest reviews
 - Photographs, video

Evaluation

- Quantitative Information
 - Visitor and participant data, sales
 - Target market – visitor profiles
 - Attendance statistics
 - Financial reports and accounts
 - Financial balance sheet
 - Economic impact analysis
 - General statistical information

Evaluation

- Qualitative information
 - Visitor perceptions
 - Questionnaires returned, exit surveys
 - Recorded chats or interviews
 - Staff and volunteer feedback
 - Management notes and commentary
- Continue to monitor donor conversion
- Review your event objectives

Evaluation

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To Summarise

1. Pre-event planning
2. Before the event
3. On the day
4. After the event

Pre-Event Planning

- Establish event objectives
- Establish the nature of the target audience, size & what activities might be attractive to them
- Research event ideas with potential participants or guests
- Analyse potential benefits and returns, including ROI and break even
- Establish a clear budget, including all potential costs
- Consider critical success factors
- Consider any potential risk to the organisation's reputation
- Secure approval from senior management and trustees
- Avoid clashes with similar activities & dates; identify successful models
- Consider running a pilot initially

Before the Event

- Venue
- Risk assessment, licenses & consultation
- Contracts
- Involvement of others
- Promotional materials
- Financial procedures
- Cancellation & contingencies

On the Day Checklist

- Fire exits & public areas
- Appropriate first aid
- Signage & directions
- Communications
- Materials & equipment
- Stewards & volunteers briefings (written & verbal)
- Banking materials stored securely
- Name badges issued to identify key personnel and volunteers
- Branding
- Phone numbers of key event contacts are stored safely

After the Event

- Clearing of site or venue
- Banking
- Outstanding monies
- Distribution of prizes
- Thank those involved volunteers/staff, sponsors and attendees
- Post-event press release for publication
- Event review and recommendations

Online Events

- Online auctions, virtual events
- Online sponsorship tools
- Crowdfunding

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2 bids

£6.42

9h 12m

+ £3.75 postage



[La Fete Cafferena Microfiber Black Camiseta UK38-40 Thames Hospicecare 109](#)

Buy It Now

£3.95

+ £1.95 postage

[Quick look](#)

Christine's page

Muscular Dystrophy Campaign - Trek Peru
on 18/06/2011



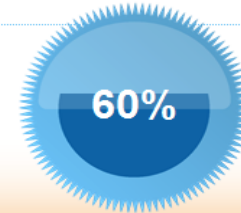
Photos (2)

Video (0)



Raising money for
Muscular Dystrophy Campaign

Target: £10,000.00
Raised so far: £5,960.00



Donate now

Hello - thank you for looking in!
Before you log straight off, can I make it clear that I have already covered **ALL** the costs of my trip and **EVERY** penny donated on this site will go to the Muscular Dystrophy Campaign. **I am NOT asking you to fund an adventure holiday for me!**

In June this year I am attempting a personal challenge - a trek to the lost City of Machu Picchu which will be immensely rewarding and uplifting for me but I need YOUR support to make it all worthwhile for Muscular Dystrophy.

Some of you may think this is a doddle but it really is physically tough and the

[Read more](#)

Recommend

16 recommendations. Sign Up to see what your friends recommend.

Tweet 6

1 | 2 | 3 | 4 | next



Good luck **Christine** I am sure it will be amazing Sue xxx Huntingdon

Donation by **sue huntingdon** on 02/06/11

£50.00
+ £14.10 Gift Aid

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Crowdfunder just got BIGGER!

We are pleased to announce Crowdfunder's merger with Peoplefund.it means your project fundraising can reach over 2 million people. To find out more check our blog!

[Home](#) > [Invest](#) > National Beekeeping Centre Wales webcam solar panel

National Beekeeping Centre Wales webcam solar panel

[Sign up now](#)[Summary](#)[Updates](#)[Forum](#)[+ Follow this pitch](#)

Founder: [National Beekeeping Centre Wales](#)

Funding target: £ 300

Days Left: 10

Location: Conwy, Wales

Category: [Environmental and ethical](#)

Reference number: P 1461

Invest Now

Funding target:
£ 300

Progress



£ 198 funded so far
66% of target

24 funders so far - [view funders](#)

Final words

Remember the Four P's

- **Product**

What are you offering and what benefits will people get from it?

- **Price**

How much will it cost in terms of money, time and effort?

- **Promotion**

How will you publicise it?

- **Place**

Where is it being held and how will people access it?

Contact Details

Giving to Heritage: www.theheritagealliance.org.uk/gth/

**The Heritage Alliance, Clutha House, 10 Storeys Gate,
London SW1P 3AY.**

Website: www.theheritagealliance.org.uk

Registered charity No 109479

Institute of Fundraising

Charter House, 13-15 Carteret Street, London SW1H 9DJ

Tel: 020 7840 1020

Website: www.institute-of-fundraising.org.uk

**Registered Charity No: 1079573 in England & Wales,
SC038971 in Scotland**