

A Guide to Hosting a Fundraiser

on behalf of the FSH Society

**THANK YOU** for helping to raise funds for the FSH Society to continue its critical mission of supporting patients and raising strategically-targeted funding for research on FSH Muscular Dystrophy.

This fundraising guide will help you plan a successful fundraiser, including timelines, getting people involved, how to get sponsors and volunteers. NO event is too large or too small to consider. EVERY event adds to our mission.

We welcome suggestions for improving our guide, along with practical tips that worked well for you.

All templates can be accessed on our Website: [www.FSHSociety.org/FundraisingGuide](http://www.FSHSociety.org/FundraisingGuide).

NOTE ON CHARITABLE GAMING: If you are considering an event that includes raffles or other types of gambling, please be sure to know the laws in your state regarding their “Charitable Gaming Rules”. They vary state-to-state and some require licensing, taxation, and special reporting. Licensing can take some time, so please allow yourself enough time before your event to apply and become licensed.

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How to Get Started

# Before all else, call June Kinoshita at the FSH Society. 781-301-6649. Begin the conversation! She will help you avoid common mistakes and guide you to success.

# Goals & Objectives

Setting a goal is very important because:

* People will ask what your goal is.
* Goals help you set your priorities.
* Goals will give the committee something to work toward.
* Is it primarily to raise money? To educate and motivate patients and families? To raise awareness? Or ALL three?

Recognizing the key objectives of your event before you get started will make it all the more successful.

When you are developing your goals, be detailed and realistic by setting numeric benchmarks.

If your goal is to ***fundraise***, your benchmarks will include:

* Amount raised through corporate and individual sponsorships
* Amount raised through ticket sales
* Amount raised through silent auction, raffle or other fundraising tools.

If your goal to ***educate or to motivate***, your benchmarks will include:

* Number of patients and families attending
* Number of new contacts made
* Number of educational and action materials distributed
* Amount of press received.

If you goal is to raise awareness, your benchmarks will include:

* Number of attendees
* How many learned about FSHD for the first time
* New relationships forged with sponsors, major donors
* Media coverage of the event

Later, you can evaluate the success of your event using the benchmarks you just chose.

# First steps

## The Committee

Engage others to help! Pull together a committee, ideally a group of 3 to 5 friends or colleagues. Who can help you as an event organizer? People who will roll up their sleeves and do the work? What resources and connections do you have that you can leverage to make your event successful? Consider these questions when asking for help.

Once you’ve gathered your committee team, you can assign roles as they pertain to your event. Some examples of roles are:

* Event Coordinator/Logistics
* Community Outreach
* Sponsorships and Donations
* Food
* Media outreach

When inviting your committee, it is best to familiarize yourself with what will be required from each position. Here are some of the tasks specific positions require:

*Everyone*

Of course, there’s much that will be most successfully completed as a group, beginning with the determination of the event goals & objectives—which will guide the whole process—to the search for a venue, the pooling of the guest list, and the day-of-the-event responsibilities.

*Event Coordinator/Logistics*

The Event Coordinator will be largely responsible for keeping everyone on track by maintaining a master calendar, sending reminders and updates to the committee and tracking progress. This person will get the ball rolling by appointing the committee and organizing the ongoing committee meetings/conference calls. Other logistical responsibilities include:

* Communicating regularly with the FSH Society on event plans, budgets, contracts, insurance, obtaining approvals for expenses, etc.
* Establishing and maintaining the event budget
* Making arrangements for decorations
* Confirming food and entertainment
* Confirming schedule details and task assignments for the actual event
* Coordinating delivery of materials to venue
* Maintaining the Guest List
* Facilitating payment for entertainer/caterer
* Organizing a debrief session
* Coordinating Thank You letters with Committee (donors, committee, sponsors, etc)

*Community Outreach*

The Community Outreach member ideally has strong ties to the community. This member will be responsible for spreading the word and attracting a crowd. He or she will know people/places who might donate outreach services. This member could also serve as the Volunteer Coordinator by organizing volunteers for the planning and event logistics.

*Sponsorship and Donations*

The Sponsorships and Donations member will need to get started right away by identifying and soliciting potential sponsors (corporate, individual, etc). This person will need to follow-up with potential sponsors and confirm successful sponsorships as the event approaches. Logistical responsibilities include:

* Obtaining and placing sponsor publicity materials and signs
* Sending Thank You Letters to all sponsors

*Food/catering*

Food is critical for most, if not all, events. From the start, the Food coordinator is responsible for determining how much food will be needed, drafting and overseeing the food/catering budget and expenses, identifying and soliciting local businesses for food donations. As the event approaches, this member will confirm donations, determine what food is still needed, develop the food budget and purchase food. Other logistical responsibilities include:

* Planning for rental or purchase of linens, serving platters and utensils, plates and napkins
* Coordinating food pickups/deliveries
* Ensuring that food is properly stored and refrigerated (if necessary)
* Laying out and displaying food (if necessary)
* Sending Thank You letters to food donors

*Media*

Publicity is important! The Media member will be responsible for press coverage, and here some experience and contacts will be quite useful. This person will begin by contacting the FSH Society and setting up a coordinated plan for public relations and marketing. This person will be asked to research which local media to target and then follow up with calls, media advisories and press kits. Post-event, this member will send a press release to relevant media outlets telling them how much money was raised for added coverage.

**At every step of way:**

* Communicate plans to the FSH Society. We’re here to help!
* Keep expenses appropriate in proportion to the expected return on investment
* Know your audience
* Reach out to as many people as possible.

## Protecting the FSH Society

It is important to ensure that the FSH Society’s brand, reputation, and legal exposure are protected while running a fundraiser. To that end, we have created a set of guidelines to be followed while the Fundraising Host executes his/her fundraising event on behalf of the FSH Society, Inc.. Please review and sign our fundraising agreement:

* **SEE: Fundraising Host Agreement.doc**

# Step-by-Step Planning

NOTE: We are big fans of GoogleDocs and encourage you to set up your own detailed event timeline and other shared documents (budget; venue research, guest lists, etc.) in GoogleDocs. This is an extremely convenient, free tool to ensure the entire event team is up to date and stays on task. No more wasted time emailing divergent versions of your event documents!

## Choose your EVENT

When choosing your event, keep in mind your main objectives and the demographics of your attendees.

Here are some ideas of events:

|  |  |
| --- | --- |
| * 5k Run/Walk or other type of race | * Guest speaker |
| * Sports Tournament | * Panel discussion |
| * Luncheon | * Educational workshops |
| * Dinner party | * Silent/Live Auction or raffle |
| * Cocktail party | * Art/Fashion show |
| * Chocolate- or wine-tasting | * Fair/carnival |
| * Concert |  |
| ***Or, Mix & Match: Combine activities for a fun Event*** | |
| * Dinner party + Silent auction | * Luncheon + Guest speaker |
| * Reception + Wine tasting | * Panel discussion + Educational workshops |

If you plan to have an Auction, we have a complete guide with templates to help you plan and execute this fun way to raise money.

* **SEE: Fundraiser Auction Guide.doc**

**NOTE ON CHARITABLE GAMING**: If you are considering an event that includes raffles or other types of gambling, please be sure to know the laws in your state regarding their “Charitable Gaming Rules”. They vary state-to-state and some require licensing, taxation, and special reporting. Licensing can take some time, so please allow yourself enough time before your event to apply and become licensed.

## Develop your BUDGET

Some thoughts on developing your budget:

* You will want to keep expenses in line with the expected outcomes, to make the effort worthwhile. Ideally, expenses should run no more than 20-25% of the value of the outcome (revenue, publicity value, etc.).
* Stay focused on maximizing the return for the effort and expense that will go into planning and executing your fundraiser. A high rate of return motivates everyone – volunteers, sponsors and donors.
* Your budget will help you answer these important questions:
  + What is your financial goal? (Ticket sales, Registration fees/team fundraising, Auction, Sponsorships, etc.)
  + How much will this cost?
  + How many people need to purchase tickets in order for you to meet your goal?
* You may use our Budget Template, found on our website:
* **SEE: Fundraising 101 Budget Template.xls**

## Choosing your VENUE

Choose your venue based on the number of expected attendees, and your budget allowance. If it’s a smaller event, you can always host in your house or at a friend’s. If that’s not an option, seek out local spaces such as:

|  |  |
| --- | --- |
| * Community centers | * Churches/temples |
| * Art galleries | * Restaurants |
| * Schools | * Parks |
| * Performance centers |  |

When choosing your venue, consider:

|  |  |
| --- | --- |
| * Attendee capacity | * Convenience of location |
| * Parking | * ADA compliance & Accessibility |
| * Ambiance | * Exclusive caterers required? |
| * Rental Fees | * On-site staff available? |

**NOTE ON SALES TAX EXEMPTION:** Because your event is for a charitable purpose, event expenses may be exempt from sales tax. Vendors will require documentation of the FSH Society’s tax-exempt status. Please contact our office at 781-301-6651 for a copy.

## 4. Create your TIMELINE

Below is an example of an Event Timeline and Tasks & General Checklist. This timeline was created with small, local events in mind: dinners, picnics, auctions, concerts, golf tournaments, walks, etc. With larger, complicated events, we recommend doubling the time needed. If you are doing this for the first time, you may want to also extend your timeline because often, the most time-consuming part is figuring things out and making decisions. You should modify this checklist to fit the specific nature of your event, and assign tasks to the Committee members. At each committee meeting (and in between as needed), review expenses and income to make sure you are on track. Make adjustments as needed.

* **SEE: FSH Society Fundraiser Timeline** for a template.

## 5. Design the INVITATIONS & RSVP cards

We have several examples of invitations from other events on our **Website Fundraiser Toolkit (www.FSHSociety.org).**

You may also consider sending email invitations, as opposed to printed invitations, to keep costs down. You can set up a free account to send out e-invitations at www.evite.com.

## 6. Corporate and Individual SPONSORSHIPS

Corporate and individual sponsors will be a main source of revenue for your event. The event committee should decide how you plan to recognize the businesses that decide to donate. Here are some ideas:

* Give credit for underwriting a specific item (i.e.: “wine sponsor”)
* Recognize at the event
* Feature in the event program
* List in the invitation
* Honor in the FSH Society’s newsletter (The Watch)
* Acknowledge on your fundraiser website and/or the FSH Society’s website

Start by asking people or establishments with whom you already have relationships, for example your favorite lunch place or a committee member’s family business. Contact local businesses, and call potential donors in the immediate area of your office or event, following this easy script:

* + - Keep your first line short—ask for the person in charge of donations or community involvement.
    - Once you’re connected to the right person, introduce yourself and your event, let them know that you’re looking for sponsors for your event and you’re hoping they will join other local businesses in supporting this event in their community. Ask them if they would like you to send along further information.
    - The person you’re speaking with will tell you how to apply for donations. Don’t hesitate to ask how to spell your contact’s name and title at the organization—that will make writing a letter later much easier.

Compile a spreadsheet of potential & committed donors. Make sure that you record all contact you have with them—including emails and phone calls—in the “Notes” section. The spreadsheet will make it easy to mail-merge into thank-you letters after the event.

* **SEE: SampleDonationSpreadsheet.xls**

Send solicitation letters. Ideally, you should hand deliver these along with event publicity materials. If that is not possible, you can fax, email or mail as requested by the business. A sample template of this letter can be found in the **FundraiserAuctionGuide.doc**.

Follow up! Five days after you send out the letters, make follow-up calls to those who haven’t responded:

* Ask to speak with your contact. When you’re put through, remind them of who you are and when you last spoke and confirm that your letter was received.
* At that point, you will most likely get your answer. If they can’t donate—thank them for their time and ask if they would like to be contacted for future events. If they agree, be sure to note that. If they can donate—thank them and confirm event logistics.

## 7. FOOD

Most, if not all, events will require you to serve food. If you’re having a sit-down dinner, you will need to hire a caterer. When you speak with caterers, be sure to:

* Get quotes from multiple catering companies—prices can vary significantly;
* Ask if they offer a not-for-profit discount;
* Remind them that your order should not include taxes.

For events besides dinners, look to local businesses for in-kind donations before spending any money on food. Compile a list of potential donors on your spreadsheet - just as you did when soliciting corporate sponsors. Remember that only a small percentage will agree to donate, and, depending on the size of your event, there will probably need to be a great deal of collaboration as each establishment may only donate one item of food. Devise specific “asks” for each restaurant/store - To help, browse through online menus.

To solicit food donations, follow the same step-by-step instructions as you did when you solicited individual and corporate sponsors.

Here are some logistical items to remember:

* Plastic plates and cutlery
* Plastic cups
* Tablecloths
* Serving utensils and platters (if not included with food)
* Ice, ice box, and ice scoop
* Set up and clean up volunteers

Remember to keep track of all purchases, document as “actual” expenses on your budget worksheet.

## 8. VOLUNTEERS

It’s always great to get a group of volunteers together to help out at the event. For the most part, these will be members of your Committee, or friends/family of the Committee. Try to get this group involved as early on as you can, that way they will a greater sense of ownership over the event, help with ideas for improvement and be more likely to spread the word.

Establish time shifts for the volunteers so that they can spend some of their time enjoying the event. Be specific about their responsibilities, some of which may include:

* Set up
* Manning information tables
* Welcoming and signing-in guests
* Serving food or drinks
* Clean up

## 9. Community OUTREACH

Your event may or may not be open to the public; here are some ways to attract as many people as possible, either way:

* Post information on your event website and /or the FSH Society’s website;
* Send out your invitations to everyone on your contact and donor lists;
* Follow-up on RSVPs with phone call and email reminders;
* Make a Facebook event and post on Twitter;
* Post flyers in community spaces;
* Post blurb in local newspapers;
* Have your friends, staff and Committee spread the word!

Websites are a great way to spread the word quickly, and most are free to create. Here are some samples of websites that have been created for our fundraising events:

* On the **FSH Society Website**: <http://fshsociety.org/events/festive-evening-song/>
* **Using Facebook**: <https://www.facebook.com/events/659891127382637/>
* **Golf Tournament**: [fshdswingforthecure.webs.com](http://www.fshdswingforthecure.webs.com/)
* **NYC Marathon**: <http://www.razoo.com/story/2013-Nyc-Marathon-Running-For-A-Cure>

# After the Event

## Send THANK YOU Notes

* A template for thank you notes can be found in **FundraisingAuctionGuide.doc**.
* Formal letters should be sent to all donors (items, food, individual and corporate sponsors, etc.). You can use the spreadsheet you created to mail-merge all of their contact information into a form letter.
* Personal, hand-written notes should be sent to Committee members and Volunteers, as well as any guests that you want to keep a personal connection with.

## Complete the BUDGET

Take time to input all of your actual income & expenses for each budget category. The FSH Society needs to correctly document all expenditures and revenue for its tax statements and audits. AND this is provides a critically important guideline for planning future events.

## DEBRIEF and Evaluate Success

It is SO important to debrief your Event.

Organize a meeting/conference call with your Committee and volunteers to hear their extended opinions. Review the initial objectives and determine how the event measured up, where it succeeded and where future improvements will be needed.

# APPENDICES

## Fundraising Economics

**How to Create a Budget for a Nonprofit Fundraiser**

*Adapted from****[Nonprofit Kit For Dummies, 3rd Edition](http://www.dummies.com/store/product/Nonprofit-Kit-For-Dummies-3rd-Edition.productCd-047052975X.html" \t "_blank)***

The bottom line is very simple: Your nonprofit’s total earnings from a special event must exceed your total cost — by a lot, you hope. Ideally, your expenses should come to no more than 25 percent of revenue raised. But how do you get a handle on revenue and expenses?

If you’re staging an event for the first time, it’s particularly important *early in the process* to ask your core supporters — board, volunteers, and event leadership — how much they intend to give. Because these people are the most likely to give generously, knowing their intentions helps you forecast the overall results.

Another way to estimate the fundraising potential of an event is to check with organizations that produce similar events. If they have presented a program year after year and yours is a first-time outing, ask them where their income levels began. Try to objectively weigh your event’s assets against theirs. Are your boards equally well connected? Is your special guest equally well-known?

**The income side of the nonprofit fundraising event**

Design your event so that it generates income in more than one way. A rummage sale may also include a raffle and the sale of some baked goods. An auction may include advertising in a printed program along with tickets to the event. **Match your revenue generating activity to the purchasing potential of your target attendees.** Standard event income categories include:

* Individual ticket sales
* Table or group sales (usually for parties of ten)
* Benefactor, patron, and sponsor donations (for which donors receive special recognition in the event program, promotions, etc.)
* Sponsorships of event participants (for instance, pledging to contribute a particular amount per mile run by a friend)
* Food and/or beverage sales
* Sales of goods and/or services
* Advertising sales (in printed programs, on banners, and so on)

**The expense budget for a nonprofit fundraising event**

Unless a wonderful sponsor has offered to cover all your expenses, your event will cost money to produce. The general categories can include the following:

* Building/facility/location (space rental, site use permits, security guards, portable toilets, tents, cleanup costs)
* Advertising and promotion (posters, invitations, publicist costs, postage, web page development)
* Production (lighting and sound equipment, technical labor, stage managers, auctioneers)
* Travel and per diem (for guest speakers, performers, or special guests)
* Insurance (for example, liability should someone be hurt due to your organization’s negligence, or shipping insurance to protect donated goods)
* Food and beverages (including permits for sale or serving of alcohol, if necessary)
* Décor (flowers, rented tables and chairs, linens, fireworks, banners)
* Miscellaneous (prizes, awards, talent treatment, name tags, signs, T-shirts)
* Office expenses (letter writing, mailing list management, detail coordination)
* All other staff expenses.

**IMPORTANT!! A hidden cost of your event is the FSH Society’s back-office support, the time spent by our staff to process payments, provide insurance binders, track event income, prepare reports and audits, etc. These are real expenses that will have an impact on our organizational performance and Charity Navigator rating. It is therefore very important – and hugely appreciated – to work out a clear, streamlined way to communicate and work together on your event.**

A WORD TO THE WISE: In spite of your careful planning, certain expenses can appear unexpectedly and cause you to exceed your budget. If you plan to serve food at your event, keep these tips in mind so you can avoid surprise charges:

* Confirm whether all service and preparation charges are included in the catering budget.
* If you need to add additional meals at the last minute, find out whether your caterer charges extra. If meals that you ordered aren’t eaten, you probably still need to pay for them. Check on your caterer’s policy.
* If some of the wine that you’ve purchased isn’t consumed, is the store willing to buy it back from you?
* If wine has been donated to your event, find out whether your caterer charges *corkage*fees for opening and serving it.

## Fundraising Idea Factory

To keep expenses low, get comfortable with begging, borrowing and bargaining! To get over any embarrassment, remind yourself and your listener that this is philanthropy. Every penny saved is a penny earned for charity.

Check out our Fundraising 101 webinars on the [**FSH Society’s YouTube channel**](http://www.youtube.com/playlist?list=PL8c5FSze5V5FiQEgcH_6ypZ5_st2JT2Eq) for all kinds of ideas and advice from the experts.

Here are a few tips and ideas to get your fundraising brain gears rolling.

* Always first ask for venue, food, services and items to be donated. Offer to promote the donor as an event sponsor. Stress the tax credit they will receive for the in-kind donation and the valuable publicity this generates for the sponsor (e.g. Logo displayed on event banners, program, press releases and media mentions; opportunities to promote their product or brand at the event\*). *Please be cautious about inappropriate juxtapositions between product and the nature of the event. With medical products, be careful to avoid the appearance that the organization is endorsing the product. You will need to screen potential sponsors in advance.*
* If items cannot be donated outright, ask for “the most generous non-profit discount” available. Again, the vendor will be credited as a sponsor (commensurate with the value of their in-kind donation).
* Contact clubs or teachers at high schools and college students to recruit groups of students to provide (and manage!) volunteer helpers.
* Think of unusual places to get freebies. One friend obtained free flower arrangements for a banquet by connecting with a florist course given at a local community college. Culinary schools are a source for lower-cost catering and wait staff.
* Make your auction packages very enticing. How about restaurant gift certificates bundled with free babysitting? A behind-the-scenes tour of a place that’s not ordinarily accessible to the public? Lunch or dinner with a best-selling book author or local personality?
* Please e-mail [june.kinoshita@fshsociety.org](mailto:june.kinoshita@fshsociety.org) to brainstorm!