A USEFUL GUIDE TO PLANNING SPECIAL EVENTS FOR ARTS ORGANIZATIONS

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Master of Arts

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A USEFUL GUIDE TO PLANNING SPECIAL EVENTS FOR ARTS ORGANIZATIONS

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Thesis

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CHAPTER I
THE IMPORTANCE OF SPECIAL EVENTS

What makes events “special”? The special aspect of events is not unlike the creative nature of any art. This nature includes the important characteristics of freedom of expression, creativity, aesthetic ideals, and a love of art forms that are dear to us and which those involved in the arts support because we feel that they are essential to the human condition. An event is a gratifying physical culmination of all these factors and a way to give something back to all those who support the arts organization. It is commonly understood that “fundraising activity in the United States has...increased 790 percent in a span of twenty-five years…, earning over $124 billion.”

Although there are no existing statistics regarding the exact contribution of special events to overall fundraising in America, it is obvious that because of constantly re-invented fundraising strategies, events have become a very powerful and essential tool.

In a sense, within the area of special events, the role of individual, and more recently corporate and foundation-based assistance has been somewhat altered. In addition to simple direct donations of money, a more proactive approach has developed, as major contributions are often used to leverage matching funding efforts of the organization, and underwrite and supply other specific tangible needs.

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The most important major occurrence, however, is the delicate balance in the relationship between a donor’s future contributions and his or her level of personal, hands-on commitment to an organization’s programs and special events. The true meaning of financial support for special events stems from the notion that the “fundraising” would occur through events that help support the mission of an arts organization. Simultaneous, they extend an invitation to celebrate the arts within the given community. Overall, this is a compelling reason to encourage all arts organizations to consider implementing a steady series of special events as standard public relations/marketing and fundraising tools. Mary Ann Jackson, a highly successful event consultant in Ohio, reminds those who are involved in fundraising for the arts that it is always important to recognize that the benefits of special event fundraising are not only monetary. For arts organizations, special events can help create a cohesive volunteer force, community awareness, an internally shared vision and “sweat equity.” Each of these elements is important, as it is imperative for all involved to know that everyone has worked together for the good of the organization. As noted by New York City Opera Special Event Manager, Amanda Descovich, “special events truly bring people who are stakeholders in an arts organization together.”

Special Events as a Public Relations Tool

It is important to realize how acutely holding an event can effect your organization. Event planning is not something to be taken lightly, as it has a great public relations value in addition to its fundraising value.

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2 Jackson, Interview by Author.
3 Ibid.
4 Descovich, Interview by Author.
In essence, a special event is an extension of the organization itself. Yes, special event planning is rewarding and can result in many benefits to an organization’s worthy cause. Still, an unsuccessful event can have a tremendously damaging effect on public image and on the possibility of success of subsequent events.

Usually, the cultivation process occurs when current donors enlist support for an organization from colleagues, friends and those not familiar with the organization. The ultimate goal is to retain donors who might know little about the organization, yet are willing to donate service, time, or money, based on the social, financial or community-related status of the current donor. Since a major goal of special events is to cultivate new donors through current ones, it is essential to avoid risking embarrassment to those who give their time and associate their names with your organization.\textsuperscript{5} As fundraising expert James P. Gelatt warns, “try facing your board when you decide to hold a benefit opening. . .under the stars, and it rains. Pours. Gowns drenched. Performance cancelled. All of it captured on the 11:00 o’clock news.”\textsuperscript{6} This hypothetical situation leads to the very first part of the special event decision-making process – organizational readiness.

To determining an organization’s readiness to conduct any type of special event, there are two major issues to consider. The first is whether or not the organization understands the implications of the attention a special event will bring to the organization—attention that may be negative or positive.\textsuperscript{7} It is important to remember that a major danger of special event planning is that when events do fail, it is no private matter. The second issue is that an organization must be prepared to capitalize on the fact that a good event will “provide entry to persons whom the organization wants to get to

\textsuperscript{5} Ibid.
\textsuperscript{7} Ibid, 87.
know."

To fail to cultivate new “friends” who may be found through an event is to miss one of the most important benefits of investing time, effort, and money in this kind of endeavor.

Is Your Organization Ready?

After considering the previous issues, the second step is for the organization’s leadership to evaluate whether or not the organization is perceived as deserving of general public support. Mary Ann Jackson refers to this as making sure your organization has already met a certain level of sophistication. In order to meet the proper level of sophistication, an organization must “have a clear sense of mission. . . , maintain the board’s strength, remain tuned into community perceptions, develop an atmosphere of mutual respect between the board and staff, and develop an active volunteer pool.”

The few words included in an organization’s mission statement dictate how the organization should operate. If there is no collective, almost missionary-like commitment among all stakeholders of the organization, it will be nearly impossible to plan and execute an event successfully. A clear mission, as well as being critical to the organization itself, helps to guide even such specific activities as a special fund-raising event. A good way to assess the sense of mission may be to conduct interviews in which key employees and supporters state their interpretation of the organization’s mission. The key employees and supporters can include the following: Executive/Artistic and Marketing/Development Directors and Board/Auxiliary Chairs. After the interviews are

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8 Ibid, 87.
9 Jackson, Interview by Author.
completed, bring the participants together for a brainstorming session at which these
different interpretations are presented and discussed, and the participants are brought to
consensus.

The next step is to assess the issue of evaluating the effectiveness and potential of
the board of directors. Board members ultimately must commit to making the event a
success. The level of affluence, influence, and participation of board members is crucial
to cultivating current donors and identifying potential donors. An organization ready to
take on a large special event has a board that has been developed carefully.

Also important for special events is the board committee structure. If effective
committees such as a development committee, a public relations committee, or even a
separate special event committee are in place, planning a successful special event is made
easier. If the committee structure is not strong, it may be important to do some self-
assessment and board development. A good board feels committed to the mission,
actively involved, responsible, and proud of its achievements. Such a board is ready to
take on a large event.

Remaining aware of community perceptions is necessary because the public
perception will greatly effect who will donate to or attend your organization’s event.
Periodically staff or board members should make an effort to “meet with constituents,
conduct focus groups, survey supporters, build on positive feedback, eliminate negative
perceptions and articulate the strengths of the organization.”¹¹ A public
relations/marketing committee is logically charged with gathering data and evaluating
community perceptions about the organization.

¹¹ Ibid, 17.
The next step is to make sure there is an atmosphere of mutual respect between the board and staff. This relationship is always complex and unique to every organization. It is essential that roles and responsibilities are clearly defined to avoid confusion and ill will. Even if responsibilities are clear, if either board members or staff members lack the expertise and experience to do their jobs effectively, the result is usually confusion, communication breakdown, and, ultimately, animosity. When such an atmosphere exists, it will be difficult to conduct even the basic logistical elements of a special event. Mutual respect, clear lines of communication and ample and appropriate opportunities for interaction are essential.

The final issue is to evaluate the organization’s active, non-board volunteer pool. These people will be critical in assisting with the duties of planning and executing a special event. While some organizations feel it is more efficient and cost effective to have staff complete tasks, such a decision puts extraordinary demands on people who already have full-time professional responsibilities to the organization. There are three other major advantages to developing and working with volunteers. First, well-cared-for volunteers are any organization’s best advocates in the community. They are familiar with programs and services, they are proud of their involvement, and they reach deep into the community in ways that board members often do not.

Fundraising specialist Stanley Weinstein points out a second advantage. “Organizations that invest in volunteer involvement often experience increased financial contributions, as volunteers are sixty-six percent more likely to make charitable contributions than non-volunteers.”\textsuperscript{12} Finally, working with volunteers on specific projects is an opportunity to identify people who may ultimately move into positions of

\textsuperscript{12} Ibid, 17.
leadership. If there is no well established volunteer pool, it may be advantageous to consider hiring of temporary staff to meet the demands of planning and executing a special event.

It is now necessary to conduct an internal financial scan of the organization. There are several factors to consider. Joseph R. Mixer suggests that, “Organizations with assets under $500,000 make up the largest segment of the charitable nonprofit field but enjoy only a small percentage of its revenues.”13 Also, these small agencies “tend to have lean administrations.”14 While it is important to be optimistic, smaller organizations must carefully consider the implications of producing a major special event to raise money. Mixer goes on to say, “development officers in these situations stretch their attention and time from grant writing and special events to publicity and annual giving programs.”15 Small organizations may be wise to focus their resources on building their effectiveness in soliciting private donations and grants. If the decision is to proceed with an event, it is wise to consider small events which may be more suitable and in many ways can be equally rewarding.

Arts organizations with annual budgets above $500,000, a well-trained board that takes on considerable fiduciary responsibility, a volunteer pool sufficient to lend manpower to special projects, and a staff large enough to allow the development department to assume leadership in specific areas of event planning, are usually ready to attempt virtually any type of special event. An organization not meeting these criteria, may still consider mounting an event. However, for these organizations, events must be carefully selected to fit their individual needs and resources.

13 Mixer, 202.
14 Ibid, 206.
15 Ibid, 207.
If the mission is clear, the board is ready, and the organization has sufficient financial, staff, and volunteer resources, it is time to begin the actual process of creating and implementing an event. The next four chapters examine the general elements of successful event planning. Chapter II, Manpower and Planning, defines the roles of everyone involved in all aspects of accomplishing a successful event. Chapter III includes information regarding successful financial planning and budgeting, the core of the fundraising aspect of special events. Chapter IV presents a plan for properly marketing an event, keeping in mind that this is an opportunity to develop community awareness of the organization and to provide a threshold experience for many people who can be cultivated into more involved supporters. Finally, Chapter V looks at the important step of evaluation and planning for the next event.
CHAPTER II
MANPOWER AND PLANNING

Board Involvement and

Entrusting Your Event to a Competent Planner

Since the leadership of your organization has determined its readiness to take on event-planning, the time has come to identify the right person(s) to create and manage an event. This choice is perhaps the most important element in the overall scheme of special events planning for the arts. Acclaimed event specialist Harry Freedman says that “successful events depend on the coordination of hundreds of large and small tasks, all of which must get done correctly and on time.”¹⁶ That coordination must now be entrusted to one, or, preferably, two individuals. If creative people with experience and organizational skills are not apparent, the result may be that hiring a professional planner should be considered. This path is expensive due to paying mark-ups anywhere from ten to twenty-three percent, as well as a set fee.¹⁷ Freedman points out that most often, organizations allow competent, experienced volunteers, many of whom have “produce(d) events on a regular basis and [have] grow(n) quite adept at it,”¹⁸ to serve in the capacity of event manager.

¹⁶ Freedman, Black Tie Optional, (Fund Raising Group, 1991), 73.
¹⁷ Ibid, 48.
¹⁸ Ibid, 73.
Another viable resource for filling the role of event manager is a high-profile board member who is willing to serve as the committee chair. Once again, board strength reveals its importance, as it is valuable if not imperative to select a person with a high profile in the community. A well-chosen chair will attract people and resources to an event, as well as becoming a magnet to attract people to attend.

Even with a great chair, chances of success are dependent on being able to count on the entire board of directors as a multi-faceted resource. Not only can effective board members make intangible contributions, such as attracting publicity, encouraging attendance and sharing expertise in given areas, they can also assist in securing underwriting donations, selling tickets, or performing physical tasks as well.

Effective volunteers are developed through in-service training. Ideally such a program exists and the volunteers are prepared to take on specific responsibilities. More often, it is useful to provide specific opportunities for volunteers to develop skills. Two effective ways to conduct this training are through the use of written material, such as this guide, or by seeking the guidance of a professional event consultant or an experienced volunteer. Another resource would be to take advantage of professional fundraising/event planning seminars. The Association of Fundraising Professionals (AFP) offers such seminars.

These opportunities may also provide valuable training for professional staff who might be assigned to work with the event team. Since hiring or having a special event manager is a luxury affordable only by large organizations, is may be worthwhile to invest in specialized training for a designated staff member already familiar with the organization’s board and volunteers.
In the case of very small or very young organizations, it may be essential, if not particularly advisable, for the executive director to serve along with a board member or volunteer consultant in the event planning capacity. At the very least, there must be an official staff liaison to the event committee.

The event manager’s main tasks sound simple: to form committees, to assign responsibilities, and to constantly monitor progress, while continuing to encourage those who are having difficulty completing their tasks. But, at this point, the value of experience becomes particularly evident.\(^{19}\) Being able to anticipate challenges and recognize potential problems is a skill learned on the job. The importance of organizational skill also becomes apparent, as does the importance of having “connections” in the community or having the charisma, energy, and determination to recruit a great committee.

**Choosing and Setting Goals for the Event**

Among the early tasks of the event managers is to agree to a reasonable financial goal and to create the type of event that will reach that goal. Financial goals are often determined from a simple examination of the financial/budgetary needs. The ability to reach a goal is more complex. While an organization can state that the proceeds will go to the organization in general, it is sometimes wise to connect the event with a specific organizational goal that may have gone unmet (e.g. programs, education, touring), or to support a program the organization wishes to expand. The more specific and unique the

\(^{19}\) Ibid, 74.
“cause,” the more likely it will resonate in the community. While financial goals can be altered according to manpower and budget, the goal should remain constant.

While the exact process of creating a special event may vary, the following creative process is usually effective. A “brainstorming” session with the moderately-sized group of committee members or volunteers who are firmly committed to working with the event manager(s) is a good way to start. The reasons for an arts organization to hold an event can usually be placed into three general categories: to support the mission, to enhance public relations, and to develop new sources of income. For example, a mission-based reason to hold an event might include celebrating the arts and artists, or honoring outstanding achievement in a given field. Two reasons an arts organization might hold a public relations based special event include exposing new audiences to the arts and raising the profile of the organization. Finally, a development based reason to hold a special event would primarily be to maximize income. Events are most effective when they relate to a combination of these reasons.

Next, it is important to understand how to accomplish the established general goals. When the organization’s event is focused on a mission-based goal, the event managers must know and be able to communicate “how” and “why” the goal will be accomplished. If the organization wishes to conduct an event in order to celebrate the arts and artists, perhaps this goal can be accomplished by establishing a prestigious award or incorporate the arts in performance, an arts related theme or an auction, table décor, etc. If the organization chooses to pursue the mission-based goal of honoring outstanding achievement, this may be done by honoring artistic achievement—either of an individual, or of many individuals within categories of art.
The first public relations-based goal of exposing new audiences to the arts will involve concentrating on the creation of an invitation list that will reach a new potential audience. The public relations-based goal of raising the profile of your organization can be achieved by focusing on the level of media coverage for the event. In assessing media coverage, it is important to determine the “hook” element. Is the focus honorees, the event itself, or some other unique arts-related element? For a development-based event (and ultimately all events are about making money), it is important to be able to establish an attractive need and to create an event with maximized potential for net income. Profit is increased by the essential activity of soliciting sponsorship and underwriting, maximizing ticket sales, and the addition of subsidiary income sources from such things as live and/or silent auctions or raffles.

Collecting materials from previously successful events, including newspaper and magazine clippings and information available on the internet, can be especially helpful when determining the right event. Conducting research on communities with comparable demographics and arts support, may result in an idea for an event that will work for your organization as well. Often it is possible to modify another organization’s event into your own. Be very careful not to infringe on the ideas of other organizations in your area. The ill will is not worth it, and the similarity of events will decrease ticket sales.

It is most often assumed that large-scale events are the most lucrative. However, Friedman suggests it might be “more lucrative to hold a small event once a month,” such as a craft fair or luncheon.20 This is because of the high risk factor in doing a large high-

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20 Ibid, 9.
overhead event that may not necessarily yield the desired profit. Unfortunately, it is possible to lose a great deal of money on a financially unsuccessful event.

Following are suggestions for consideration. They include examples of categories of fundraising events which have proven successful.

One event that may be appropriate for an arts organization is an Awards Gala augmented by an object-focused auction. Such an event creates an opportunity to integrate a mission-based focus with fundraising potential. For a successful gala, it is first important to have a theme that is, ideally, unique to your particular city or community. The focus of this type of event might be to honor artists. It could honor outstanding patrons, volunteers, programs, business supporters or educators. It might be enhanced by the recruitment of local celebrities to present the awards.

A gala of this nature can be adjusted for size, but is generally large-scale. More than likely it will demand considerable technical capability, as well as the usual food and beverage service, parking, etc. Hotels or arts centers would be appropriate venues to explore. Manpower resources are also very high, and committee structures tend to be complex. An awards gala may require more effort than other events, yet it can also be one of the most rewarding—both in terms of celebrating the arts, and in terms of generating income. Planning can take up to a year and requires great attention to tasks unique to this kind of event, such as the formation of nomination and judging committees and policies. Additional information about planning a gala is found in Appendix 2, and a sample nomination form can be found in Appendix 3.

Another kind of event may provide your organization to collaborate with area vendors in an effort to celebrate a renewed sense of community or regional pride. One
The idea may be a food festival or antique/craft exhibit. The process for creating a food festival event may be based on a type of food or beverage unique to your given community. Or, it can focus on a specific dish, such as a casserole, pie, or barbecue. This kind of event also presents an opportunity to involve local celebrities—perhaps as judges in a food competition. Also, area organizations or restaurants may be invited to participate and your organization could charge each of them a fee for a booth placement.

In order to keep money handling at a minimum, patrons should be able to purchase tickets for a blanket fee and exchange them for food. Manpower is dependent on the scale of the event and the number of participants, but planning time is less demanding—perhaps three or four months. This planning time is primarily for the purpose of recruiting participants and securing any necessary licenses and a proper venue, which might be a county fair area or exposition center.

An antique/craft exhibition is quite similar in organization to a food festival and includes assembling as many area antique dealers as possible and charging each for a showcase/booth space. It is also a good idea to hold this type of event at an exposition area or county fairground, because it will require a great amount of display and parking space, accompanied by the need to monitor admission. A moderate admission fee could be charged and appraisal juries could be held. These would attract attendees with family heirlooms and other objects they wish to have appraised. Also, area restaurants, which offer diverse cuisine could be invited to sell food and beverages. If sufficient preparation time is scheduled, the necessary manpower would be moderate and planning time would usually be up to six months for a small show or up to a year for a larger one.
If an arts organization’s mission and objectives include education, perhaps one could consider presenting a young artists showcase. The benefits from the event could go towards the organization’s educational programs. Also, perhaps a designated amount would go towards scholarships for the winners. The recruitment of local arts and humanities-related celebrities as judges is a good idea for this event. Including local celebrities increases the potential for media attention and community awareness. A proper venue would be any moderately priced local auditorium, or your own facilities.

Manpower for this type of event is moderate. Unique requirement include the early creation participant criteria, the distribution of applications to the talent, the securing of judges, ticket sales, and publicity. The call for submissions is a great “early” announcement that the event is coming up. According to Freedman, planning time for this type of event should be no less than two months.

Due to its appeal to a more general audience, one of the greatest opportunities for media sponsorship and collaboration is a costume ball. Perhaps the greatest opportunity afforded by a costume ball, is that there is a great deal of thematic freedom. The ball may celebrate a holiday or a season or something completely fanciful or creative. Another potential attraction of this event, and certainly a media attraction, might be a costume contest. The manpower for a costume ball is moderate to high. Essentially it should be planned as a gala would. This type of event usually takes about six to twelve months to plan.

Another major consideration regarding event selection is the prospect of creating a “signature” event, as opposed to unique events each year. There are great advantages to holding annual or bi-annual organizational events. Among the benefits is the ability to
build on previous experience. It is also possible to make use of previously established media and community interest and brand recognition.

This can be helpful in establishing the prestige of the event, or of being selected as an honoree. However, according to New York City Opera Special Event Manager, Amanda Descovich, “The most notable obstacle of an established event is that the event managers must constantly strive to re-invent the concept of the event itself, in order to prevent stagnation. It is very difficult to resurrect a predictable event.”

Once a decision has been made as to the general type and direction of an organization’s event, the next step in the goal setting and planning process is to draft a preliminary budget—one built on reliable estimates of potential income (ticket sales, etc.) and expenses. One good example of this type of document is fundraising expert Stanley Weinstein’s Preliminary Budget Analysis (Figure 2.1). Although many fundraising professionals suggest that “organizations should not undertake a major special event unless the organization forsees a realistic possibility of netting $40,000 or more,” this amount is not always the standard, as community standards of living and economic factors vary.

Remember that stakeholders of the organization must, and usually are willing to set the standards of support. As Weinstein says, if the stakeholders do not believe in the project enough to give generously, “how can others. . .be expected to. . .?” A quick look through photographs, press clippings, and other media coverage for an event will undoubtedly support the fact that the same smiling faces are seen at each event. It would

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21 Descovich, Interview by Author.
22 Weinstein, 170.
23 Ibid, 3.
also be apparent that these same generous people support many related arts or non-profit organization’s events as well. Event planners are always be cultivating that core group of supporters and their acquaintances.

Figure 2.1  Weinstein’s Sample Preliminary Budget Analysis

**Income:**

a. Ticket Price multiplied by an estimate of the number of ticket purchasers (or table price multiplied by the number of tables); plus
b. The amount expected to be raised through event sponsorships; plus
c. Journal or program book sales; plus
d. The amount expected to be raised from a silent auction, if any; plus . . .
e. The amount expected from other sources of income unique to the event.

This is the projected gross income. Now subtract the total dollars the organization expects to spend on the following:

**Expenses:**

a. Meals, drinks, and other food expenses
b. Printing of event program books and advance notification card or letter, if any
c. Invitation printing and . . . postage for the advance card and invitation. . .
d. Staging, audio/video, music and entertainment, if any
e. Flowers and table decorations, if any
f. Awards
g. Photographer
h. Miscellaneous and other expenses unique to the event
Total the projected expenses and subtract them from the projected income; this is the estimated net income.24

**Time and Date Selection and Related Details**

Many things must be taken into consideration when choosing the best time for an event. For instance, although events can be successful on a Friday, research shows that this is not the ideal time. Event managers must consider that many people are ending their work week and would like to retreat for at least a portion of their weekend. In essence, patrons and volunteers would be asked to do more work at the end of an actual work day. Another important consideration is whether or not volunteers will have “sufficient time to leave work and have everything ready before guests arrive.”25

Common experience indicates that “for...fundraisers and special events...a Saturday night is the most successful for achieving maximum attendance.”26 Before the date is finalized, it is wise to investigate seven important areas that could have an effect on an event. The are are:

1) **Major Holidays and Religious Observations**: Check to see if there are any around the proposed event when guests may have family plans.

2) **School Breaks**: If the event is scheduled to take place over one of the school breaks, guests are more likely to be out of town.

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24 Ibid, 169.
26 Ibid, 29.
3) **Long Weekends:** According to Weinstein, “The days before or following a long weekend are not considered the most favourable for achieving maximum attendance at your event. People’s energies and focus will be elsewhere.”

4) **Sporting Events:** Is the “big game” on that night? Are there sporting traditions that will be broken from attending your event?

5) **Other Special Events:** Arts organizations should support each other’s endeavors, as many patrons do. If another group is having its annual ball, it is bad form to interfere. Besides, the number of big ticket patrons is finite.

Another detail is attire, as time of day often dictates what guests will feel comfortable wearing. The decision to make the event daytime precludes formal/black-tie clothing. A 5:00 p.m. event on a workday makes “business” clothes convenient. Most importantly, guests should feel comfortable – not over or under dressed. It has become almost expected that an invitation will suggest attire for the event. Unfortunately, today these suggestions often create confusion. To one individual, “casual dressy” could mean khaki’s and tie and for another it could mean a cocktail dress with minimal jewelry.

**Visualization**

Visualization is an important factor in ensuring a successful event. It is “a step-by-step process that walks [a planner] through [an] event and allows [one] to see...potential problems in advance.” It is here that one can outline all of the crucial ingredients of an event that would meet the goals set. With the initial planning visualization, some

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27 Ibid, 33.
important issues to revisit should be: Why are you holding the event? Besides the core audience, what other type of people are you looking to attract? What day and time of year? These issues can all be decided with the help of special event professional, Freedman provides a template for a Visualization Checklist (Figure 2.2). Once the organization has made a decision on the type of event and goals and completed the visualization process, it is then important to draft either a Special Event Position Statement or Event Fact Sheet. Examples of these documents developed by the Akron Area Arts Alliance in 2000-2001 can be found in Appendices 4 and 5, respectively.

Figure 2.2  
Harry A. Freedman’s Event Visualization Checklist

Purpose of the Event:

Primarily to raise money

Gain new members, new donors

Figure 2.2 continued

Get publicity and/or visibility

Determine Your Target Audience:

How many people are required to make the event a success?

Where will your audience come from? What are they willing to spend?

Is the event something people might attend if it were not for charity?

Program Event Ideas:

Will it help to achieve your group’s goals?

Do you have enough time to plan this event?

Do you have enough staff/volunteer support?

Check the Calendar:

Did you make sure there are no conflicts with other major events?
Have you checked the weather on that date for the past few years?
Did you set your day and time to fit the audience’s work schedule?²⁹

Both of these documents define the event and will be the first of many documents you will need to keep and distribute to necessary persons working on the event. It is important to date all correspondence and documentation, as circumstances will change and it is important to have the most current information available at all times. The first item of the statement should be the “mission” of the organization and the event itself. Other items should include goals, date, etc. and an outline of the event. Fact Sheets are simple lists of all important data about the event. However, Fact Sheets may provide an opportunity to promote the organization further, by providing extra information about it, in addition to the “Who, What, Where, When and Why” of the event. The fact sheet often becomes an important component of the overall event information kit used for recruiting additional committee members.

Committees and Volunteers

In order to begin the hands-on portion of the event planning process, the event managers must select exactly who will be working with them. The most effective way to do this is, is to examine the expertise and knowledge of other board members, volunteers, and other community contacts that may be willing to assist in this endeavor. As one begins to visualize the event, take into consideration the necessary committees and draft preliminary assignments for the duty of sub-committee chairs.

Both professional event planning rules of thumb and the Akron Area Arts Alliance list suggest that the following committees exist: Invitation Lists/Mailing, Awards, Program Presentation (use of space, limitations, etc.), Entertainment, Food/ Beverage, Décor, Marketing, Check-In, Patrons, Corporate Tables, Financial and Clean-up. Since one of the most successful ways to raise money at a larger scale event is to add fundraising elements, such as a live and/or silent auction or raffles, there may be a need for an additional committee to be in charge of these elements. Committees and volunteers are at the core of manpower for a special event. In order to utilize them to their maximum potential, the event managers must secure a firm commitment from the possible committee chair assignees. It is important to have dedicated chairs, as committees left to its own devices can easily lose focus.

A meeting should be held then with the working committee co-chairs and both the event managers to select whom to approach for committee assignments. The board plays a direct crucial role here and an indirect role with finances because, if possible, the honorary chairs should be board members and may thus provide in-kind and other services.

The difference between an active “working” and “honorary” chair is that a board member or public figure without the time to head the committee may lend his/her name and eventually professional expertise, while the active committee co-chair has more time to devote directly to the event. The chairperson’s responsibilities include giving a monthly report to the managers, as committee meetings should occur on a regular basis, at least once a month until approximately six weeks before the event, when meetings

\[\text{Ibid.}\]
should occur twice per week. Always inform the committee members of upcoming meetings, first by mail, then by e-mail or telephone follow-up. During the final month prior to the event, at least three joint committee meetings should be held, in order to inform all of the event staff of current progress and to assess what tasks remain.

Someone within each sub-committee will need to be responsible for keeping minutes on all committee activity discussed during meetings. Another major responsibility of the committee chair is to compile written financial estimates for the event managers and await final approval from the event manager, prior to committing to them. In fact, the individual(s) in charge should make sure all vendors know that the event manager is the only person authorized to make any financial commitments for the event. Once the committees are formed, it is important to provide each member with a thorough description of the committee’s role in planning the event. In addition to providing a roster of all committee members’ contact information and information on training for their specific duty, it is wise to also consider local celebrities for committee assistance. Supplementary materials for organizing and maintaining committees can be found in Appendices 6 and 7. One of the most dangerous mistakes in special event planning is to have too many individuals with the same responsibilities.

If this occurs, miscommunication could lead to serious problems, both during the event and afterwards, and people may be discouraged from participating in the future. It is important to remember that when “designing volunteer training . . . consider what the volunteer should know and be able to do, and the attitudes or perspectives that are
It is essential to reinforce the concepts of each committee member’s ownership and accountability for all event responsibilities.

**Committee Descriptions**

Always list the member names and corresponding duties. Deadlines for task completion should be given. In addition, all committee members should sell tickets or contribute to the selling of tables, if applicable, to the type of event.

**Invitations – Mailing and RSVP**

First impressions mean a great deal in any situation, and for this reason, the presentation of an event’s invitations should be unique and well-done. Sometimes, it is effective to have this committee be a sub-section of the decoration committee, in order to establish a unified “look.”

Freedman suggests that this committee “decides on the design, format and content of the invitations; negotiates and coordinates with the graphic artist and printer; and proofreads the invitation before it is sent out.”

A list of other responsibilities includes the development of the mailing list, and working with the event manager on a timeline in order to determine the mailing date and response time. etc.

Duties also include either mailing the invitations or obtaining estimates from bulk mailing houses to do so, and developing an RSVP system. The final set of duties consists of mapping out seating arrangements, developing a complimentary invitation system/list and assisting the event manager with processing payments.

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32 Freedman, 107.
Awards

The Awards committee may vary in size, depending on the number of awards presented during the event. Basic responsibilities include: defining criteria for awards, creating support information and application forms, and determining application distribution. The committee will also decide on or act as a selection committee in order to give input on the design of the actual award. A list of issues to consider include: determining a policy regarding slow return of nominations or inadequate caliber of nominees, deciding whether or not nominees or only winners are announced in advance, etc.

Program Presentation/Logistics

The Program Presentation/Logistics committee produces the actual event. If there is a script for the ceremony, members of this committee will be responsible for writing it. Other duties include: stage decoration, logistics (timing, stage set-up, microphones, lighting, etc.), program design and printing.

Entertainment

The Entertainment committee coordinates music or whatever entertainment is planned. Members work closely with presentation and with the event coordinator, to ensure proper talent is acquired within the given budget. However, all contractual negotiations are made by the event manager.

Food and Beverage

The Food and Beverage committee is responsible for selecting a menu, which is usually based on the event theme. Its members coordinate with the hotel, caterer or volunteers who will prepare the food and if any additional equipment is needed, they are
responsible for acquiring it. This committee also has the distinction of attending food “tastings,” in order to decide on the menu. Specific considerations might also include the distribution of alcohol (bar, cash bar, delivered to tables by servers, etc.).

Décor

The Décor committee develops and achieves, along with the event planner, the look of the event. The committee is also responsible for the renting of tables and chairs, and obtaining door prizes.

Promotion/Marketing

The Promotion/Marketing committee can exist independently, or the organization’s paid staff of public relations and marketing professionals can handle publicity for the event. Duties include press release writing and conducting follow-up telephone contact. Generally, one or two members serve as liaisons for the media on the day of the event.

Other duties include securing photography, determining media activity at the event and soliciting coverage from all mediums on the organization’s media list.

Check-In/Valet

Check-In/Valet Committee members choose a professional firm to do this task, or they may solicit additional volunteers from community organizations such as local music services groups/fraternal organizations or ROTC, etc. Other duties include developing and implementing a registration process and parking coordination.

Patron Solicitation

The Patron Solicitation committee is responsible for drafting a list of community members who might be interested in donating support. Then it is this committee’s
responsibility to actively solicit this support. Members may write letters or conduct smaller “friend raising” activities in order to cultivate the potential patron group.

Corporate Tables/Support

Often, members promise to buy a certain number of tickets and match that amount in other sales. Freedman suggests that they “formulate the list of people to whom invitations or notices will be mailed and solicit block purchases from corporations and individuals.”33 This committee may also be responsible for forming suitable corporate and media partnerships for the event. One of the most effective tools for this committee is the compilation of an event “kit,” complete with organizational and event specific information, including the programs to which the proceeds will go.

Financial and Underwriting

In many cases, paid staff plays a key role in this area, as it will save the accounting department a great deal of trouble if they handle the major financial responsibilities. If the organization’s resources don’t allow for this, the treasurer of the board may be responsible. Still, other members are responsible for soliciting underwriting support.

Clean-up

When the event ends, there remains a great deal of work to be done. If possible, hired staff can be brought in for the night. If not, the committee is responsible for recruiting volunteers to clean up the venue and return materials after the event.

Special

33 Ibid, 107.
Depending on the type of event an organization is holding, several other committees may be needed. For instance, “an auction will need an acquisitions committee. . .and an arts and crafts or antiques show requires a committee to coordinate the vendors and booths.”34

Now that the organization is aware of what type of event it wants to attempt, it is important to remember that many elements may change after a strategic look at financial and other resources. These issues will be discussed in Chapter III.

34 Ibid, 108.
CHAPTER III
BUDGETING AND MAJOR EVENT ELEMENTS

One important rule of successful special event planning is that an event must be conducted as a business, rather than as a social gathering. The first step in assuring success is for event managers to take a realistic view of what can be accomplished, in relation to the uncertainty of income and potential costs.\textsuperscript{35} Events can be costly. Therefore, it is important to secure as much financial support as possible. It is also important for arts organizations to have staff available to ensure the use of sound practices when planning events, so that everything will be done with great attention to detail.\textsuperscript{36}

To begin a successful budgeting process for an organization’s event, it is important to remember that in order to maximize income for the event, one must become familiar with budgetary boundaries. The most effective way to achieve this familiarity is to carefully examine each and every element of the event, and compile a budget worksheet, based upon preliminary budget figures. An example of such a worksheet is provided by Friedman in Figure 3.1. These examinations will help determine necessities and organizational or board contacts who may be willing to give or assist with charitable contributions to secure them, often through in-kind services.

\textsuperscript{35} Descovich, Interview by Author.
\textsuperscript{36} Jackson, Interview by Author.
Figure 3.1  
Harry A. Freedman’s Sample Budget Worksheet

**Income:**

Purchase and sponsorship of $_____ per seat/ticket x _____ seats.

Additional Sponsorship/Purchase

<table>
<thead>
<tr>
<th>Levels</th>
<th>Purchaser receipt</th>
<th>Projected Sales</th>
<th>Other Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patrons</td>
<td>$_______</td>
<td>_____tickets/seats</td>
<td>____________</td>
</tr>
<tr>
<td>Sponsorship</td>
<td>$_______</td>
<td>_____tickets/seats</td>
<td>____________</td>
</tr>
<tr>
<td>Contributions</td>
<td>$_______</td>
<td>_____tickets/seats</td>
<td>____________</td>
</tr>
</tbody>
</table>

Raffle (if applicable)

Cash Bar   $_______   _____ticket/drinks   ___________   ___________

If there is an Advertising or Program book, the information would be entered as follows:

<table>
<thead>
<tr>
<th>Level</th>
<th>Purchaser Receipt</th>
<th>Projected Sales</th>
<th>Other Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>_____</td>
<td>page _____tickets</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Expenses:**

Space rental

Additional site costs

Box Office

Lighting

Audio/Visual

Subtotal

Food and Catering

Food   persons @   

Per Person

Equipment Rental

Gratuities (18 percent)

Subtotal

Decorations

31
<table>
<thead>
<tr>
<th>Category</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security</td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
</tr>
<tr>
<td>Music</td>
<td></td>
</tr>
<tr>
<td>Talent</td>
<td></td>
</tr>
<tr>
<td>Honoraria</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td>Graphics (design/printing, etc.)</td>
<td></td>
</tr>
<tr>
<td>Invitations</td>
<td></td>
</tr>
<tr>
<td>Ad book/Program</td>
<td></td>
</tr>
<tr>
<td>Tickets</td>
<td></td>
</tr>
<tr>
<td>Media Kits</td>
<td></td>
</tr>
<tr>
<td>Posters</td>
<td></td>
</tr>
<tr>
<td>Signs</td>
<td></td>
</tr>
<tr>
<td>Prizes, plaques, certificates</td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td>Postage</td>
<td></td>
</tr>
<tr>
<td>Invitations</td>
<td></td>
</tr>
<tr>
<td>Tickets</td>
<td></td>
</tr>
<tr>
<td>Publicity</td>
<td></td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
</tr>
<tr>
<td>Photographer</td>
<td></td>
</tr>
<tr>
<td>Reproduction, mailing</td>
<td></td>
</tr>
<tr>
<td>Media advertising</td>
<td></td>
</tr>
<tr>
<td>Entertaining and free tickets</td>
<td></td>
</tr>
</tbody>
</table>
Figure 3.1 continued

Phone Bills ___________
Subtotal ___________
Special Events Production Firm ___________
Misc. Costs ___________
Additional 20 percent/contingency fund ___________

TOTAL ANTICIPATED INCOME ___________
TOTAL PROJECTED EXPENSES ___________
PROJECTED NET PROFIT (LOSS) ___________ 37

Please note, that after compiling a budget, it is also important to re-format the same document into a payment schedule. In-kind services are those rendered to a non-profit organization without actual payment. One major benefit of this type of contribution is that the fair market value of an in-kind service may be exchanged for a tax deduction.

Location

The chosen venue will be a very important factor in the total cost and success of the event. There are usually four basic options for an event site: hotels, private buildings, public buildings, and outdoors. Some general considerations include size and what elements are actually included in the overall cost of using the venue. The actual room size necessary to hold attendees may be a difficult thing to determine and is often dictated by the type of event being held. Visualization is important here, as the event manager must map out every aspect of the event and how it will comfortably take place within the

37 Freedman, 30-31.
given space. This is among the simplest, yet most crucial event planning tasks, as misuse of space can create a domino effect of problems over the duration of the event.

Also, remember details. For example, “the amount of space needed to hold 200 people for a cocktail party will be considerably smaller than what’s required for a sit down dinner for the same group.” Take new measurements of the space, as the figures given by the site management may not be reliable in reference to the person per space allowance you require. An added benefit of certain sites is the inclusion of many other elements (audio-visual, lighting, etc.) in the total price. Some other important considerations include noise restrictions, insurance and zoning laws.

Hotels

Holding your event at a hotel has many benefits. The most notable of which is that most hotels can provide major elements required to stage an event. From microphones to stage skirts, and platforms to catering, hotels can make it much easier to hold an event on their property. It is important to remember, however, that while the organization is a non-profit arts organization, the hotel is still very much for profit. Therefore, negotiations are vital. Many quoted prices may be high and there may be potentially expensive restrictions, such as the distribution of alcoholic beverages, related to the required use of some in-house products.

A hotel should be chosen wisely, as some are not equipped to handle large scale events. Finally, one especially important aspect to check with a hotel is when one would actually have access to begin using the facility. Though much preparation can take place

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38 Freedman, 120.
off-site, a certain amount of time and access is required before and after the event itself. If the hotel cannot provide this access, it is best to look elsewhere.

**Private Buildings**

This category may include churches, synagogues, community or fraternal organization-owned buildings. Because of appropriateness and space restriction issues, (for example, if the organization strives to remain associated with the secular realm and plans to hold a costume ball), it is probably not a good idea to hold a special event at a church or synagogue. An exception might be an event on the level of a pancake brunch, etc. Also, churches and synagogues are most often already non-profit spaces, with very specific fundraising agendas of their own. However, the use of a hall owned by a community or fraternal organization is often a good idea. If the organization should choose to use one of these as the event site, creativity could abound and costs could become lowered with the use of extensive decoration and excellent catering, as opposed to choosing a venue with a higher base-price. Also, negotiations are usually less complicated.

**Public Buildings**

This category may include courtyards, museums, cultural centers and government or school properties. An impressive special event can be held at many of these venues. However, there are many things to consider. For instance, although the organization may be able to use the space free of charge, most public buildings are not equipped for large social gatherings. Elements such as kitchen, dishes, glasses, tablecloths, or adequate supply of chairs, which are easily available from a hotel, may have to be provided from
outside sources, and therefore may cost more in the end. Other issues such as security and clean up must also be considered.

**Outdoors**

The most popular outdoors sites are parks, zoos, botanical gardens or beaches. One of the major benefits of these sites is an abundance of space. Still, there are a number of logistical issues to debate before actually committing to an outdoors site. This abundance of space may also allow for many possible entrances and, therefore, a lack of admission control, which can be one of the greatest obstacles to overcome. Event managers must check on regulations regarding licensing, cleanup, alcohol consumption and any other necessary rules, in order to determine exactly what is expected of your organization during all stages of the event. Other considerations include the creation of an event venue from the outdoors site. For example, one popular choice is the use of tents. In this case it would be advisable to take a site visit after a heavy rain to check for flooding, in order to ensure that the ground will support the tent anchors.\(^{39}\) A general rule is to “allow 20 square feet of floor space per person when calculating the size of tent you need.”\(^{40}\) When using an outdoor venue, an organization is entirely dependent on nature to provide a beautiful day or night. In addition to this, it may have to import many basic items, such as restrooms (one per 75 guests).

**Audio Visual and Lighting**

Depending on the nature of the event, technical needs may vary in complexity. Event managers need to ensure that each stage movement is well lit and timed. It is wise

\(^{39}\) Ibid, 121.
\(^{40}\) Allen, 65.
to enlist the help of professionals in order to accomplish adequately lit and timed stage movement.

When creating a budget, it is usually wise not to be thrifty in this area. When negotiating a contract for audio-visual and lighting elements, seek out several proposals, as some firms offer special rates for charity events. Always be aware of union requirements, such as the use of unionized hotel service staff, which might have an impact on the bottom line. A good audio-visual and lighting contract will always include the exact specifications required by the performers. It is also important for the event managers to encourage the audio-visual company to work closely with the members of the presentation committee in order to create the most professional production possible. Costs in this area usually include dismantling and operating fees.

**Food and Beverage**

Freedman attests, “more than any other single factor, food plays a major role in an event’s success or failure, both financially and in the eyes of donors.” If the food at an event is substandard, it will be the main topic of discussion at each and every table. Careful negotiations are essential when dealing with food, as the event manager can work with caterers to have recipes altered to lower costs. Some venues require a food and beverage purchase minimum. This means that even if an organization does not sell enough tickets to break-even, it will be left with the remaining food. If this situation should occur, any leftovers can be donated to charity. It is always a good idea to try to secure underwriting for food related expenses. There are four major factors to consider

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41 Freedman, 147.
when determining an event menu. These factors include: audience, venue, meal type, and budget.

When dealing with a potential audience, it is important to know who will be attending and what their general eating preferences are. Cultural and religious issues could definitely be factors in this area. Certainly groups with similar tastes will require less effort in planning. When dealing with event venues, one major consideration is whether or not there are ample cooking facilities, should your organization decide not to employ catering services. Select a venue which allows for successful serving of food that requires a certain temperature (hot or cold), or that requires any last minute preparation. Meal type simply refers to the heaviness of a meal and use of seasonal foods. For instance, it can be very costly to serve out of season fruits. The most efficient use of event food budgets includes being aware of exactly how much can be spent and creating the menu accordingly. Unless it’s a highly priced event or you have secured a considerable amount of underwriting, choose a moderately priced but interesting meal.\textsuperscript{42} The only two immutable things to remember about menu planning is to never run out of food; and, in today’s health conscious society, to have a variety of foods readily available.

Related to the selection of menu is the mode of service. There are two basic ways to serve food: buffet or sit-down. Buffets can be the easiest type of meals to serve because they require fewer service staff, and because with multiple stations, meals can be served quickly; but they are not necessarily less expensive. Often, caterers charge at 1.5 portions per person, as opposed to sit-down meals at one portion per person.\textsuperscript{42}

\textsuperscript{42} Ibid, 149.
Nevertheless, the per-person costs for sit-down meals are usually considerably higher than for buffets. Sample menu ideas that may help in planning the food portion of its event can be found in Appendix 8.

*Never* sign a food and beverage contract unless the event managers have had a tasting of each menu item. In the menu proposal, ensure that a clear explanation of how and when food is prepared and served is given, as fine-tuning a menu will make all the difference in a successful event.

Another issue is that of serving alcoholic beverages. If alcohol is to be served, it may be wise to issue guests drink tickets, which are included in the price of the meal, and are available at the registration area. This way, the venue will be completely responsible for handling a cash bar. Most hotels require use of their personal liquor service and corkage fees. Rates starting at 18%, or $10 a bottle may apply simply to place the bottle on the table.

If the organization is physically preparing the food, compile a shopping list of what is needed, including such things as service items, cleaning supplies, etc. Once food selection has been determined, it is equally important to know how the food will be served. Buffets may be easy to serve, but here attractive display is almost as important as good food.

It is also a good rule of thumb to have at least one server per forty guests, to assist with re-filling food and taking care of any other unforeseen problems. For a sit-down meal, it is recommended that there be at least two servers per twenty guests, and two servers per ten guests if the meal is formal. Determining seating capacity is important.
The table is where guests spend the majority of their time at many events. The table presentation is especially important to creating the overall event dining experience. A useful seating capacity chart by event expert, Judy Allen can be found in Figure 3.2.

![Seating Capacity and Tablecloth Sizes for Round Tables](image)

<table>
<thead>
<tr>
<th>Seating</th>
<th>Table Size</th>
<th>Floor-length Tablecloth</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-12</td>
<td>72 inches</td>
<td>132 inches</td>
</tr>
<tr>
<td>6-8</td>
<td>54 inches</td>
<td>114 inches</td>
</tr>
<tr>
<td>4-6</td>
<td>48 inches</td>
<td>108 inches[^43]</td>
</tr>
</tbody>
</table>

Finally, remember to show staff and volunteers appreciation by providing them with some type of refreshment. If possible, a meal is the best option. Either work with the venue to provide the food, which may be as simple as box lunches, or have the caterer prepare something. Since the meal will probably be consumed at the venue, make sure that the rules do not prohibit bringing food in from another source. Also, examine the gratuity added to the event bill and remember that as a non-profit organization, there will be no taxes charged. Keep any necessary documentation proving your non-profit status handy at all times.

**Catering**

If the venue does not provide its own food service, the event manager might consider hiring a caterer. There are considerable benefits to using full or partial service

[^43]: Allen, 187.
caterers, as the company can be responsible for the overall set up. The set-up usually includes: equipment and service rentals, preparing the food, providing ample staff, and even decoration, if needed. With a partial service caterer, the event committee would be responsible for some of these tasks and with a no-service caterer, the only task the committee would not perform is food preparation.

Be sure to determine whether or not the servers provided are unionized. In this case, the number hired is not negotiable. It is important to check references and actually sample the prospective caterer’s food. In fact, it may also be wise to check with the local health department to ensure that the company has never been cited for any violations. Once you have selected the caterer, closely examine the contract for a clearly defined cancellation policy and also to avoid being overcharged small percentages for hidden costs (10% for food and rentals, etc.). Finally, always inquire with the catering company what the exact attire of the servers will be, as there may be options available to better suit your particular event. A useful tool is the checklist found in Figure 3.3, drafted with the assistance of event expert, Judy Allen.

Figure 3.3       Food and Beverage Checklist

✓ Assess the event’s audience, venue, type of meal and budget. Eliminate inappropriate foods.
✓ Develop a list of possible hotels and caterers.
✓ Meet with managers to discuss menus, costs. If preparing the food yourself, discuss this within the committee.
✓ Taste the food.
✓ Make a decision about how food will be prepared for the event.
✓ Conduct contract negotiations to your satisfaction.
Figure 3.3 continued

✓ Make a checklist, if using a caterer.
✓ Determine exact menus and beverages.
✓ Have a meal prepared for volunteers and staff or give them a stipend of approximately $8 for the purchase of an off-site meal of their choice.
✓ One week prior to the event, complete the guarantee and finalize it not later than two days before the event.
✓ If the organization is preparing the food, create shopping list and duties for committee members.
✓ Prepare and/or serve the food.
✓ Make arrangements for any leftovers, which should usually go to a homeless shelter.
✓ If you are happy with the service and would like to hire the venue or catering company again, be sure to add a substantial gratuity.

Parking and Entering the Venue

Under no circumstances should guests arriving to or departing from an event frustrated. Parking, both its accessibility and availability, plays an important part in the overall success of an event. It is important to decide what type of parking is best suited for the event. For formal gatherings, valet parking is usually best. For more casual events, a standard, designated parking lot will serve. In some cases related to distance or weather, a shuttle service should be considered. Some parking aspects to consider include the following questions: From where will most guests be coming? Are any necessary street permits on file? What is the estimated number of cars and capacity of the lot? Where is the closest available parking and who owns it? What time does the parking area open and/or close? Is pre-paid parking available and can a section of a
given lot be reserved for attendees? If so, how will stickers/permits be distributed? How many attendants/security personnel will be on duty? Is the parking area fully wheelchair accessible?

The first thing to consider for guest arrival is the convenience of the venue entrance. The event managers should ensure that the entrance area is as weather friendly as possible. Weather adaptability would include a covered area for a rainy day or night and a convenient drop off point for the venue. There should be staff to ensure safety should the event be held during the winter when ice, slush, and snow can be a factor. There must be a reliable, secure coat check, with plenty of racks and hangers. Finally, the registration area must be clearly visible. It is also important to realize that standing in line is a poor way to start an evening. There are many creative ways to keep guests entertained. For example, the sign-in area might be enhanced by some sort of performance or simply with visual interest. If the next stop after signing in is a distance, thematically costumed escorts would get the festivities started right at the door.

Sealing the Deal and Contracting

First, conduct a preliminary screening of venues by calling and checking with reliable references and then choose five or six sites. After meeting with site and/or banquet managers select a short list and negotiate! Contract negotiations can be tedious, but can also be extremely lucrative. No matter what the verbal offer is, remember that nothing is final unless it is in writing and signed.
When the venue has been selected, examine a copy of the site plan to map out how the space can be used. Remember to ask for any available permanent configurations. For some venues, the planner will be responsible for drafting a site map, mapping entrances and exits, bathrooms and other important areas.

Finally, budget for gratuities, which are usually around 18%. Contracting is the final step of any decisions made for an event. Therefore, a thorough process of reading the “fine print” is always necessary—both to save money and avoid being taken advantage of. Although guarantees and minimums exist, nearly any item can be successfully negotiated. It is wise to have some plan of recourse in case something goes wrong, and this plan will depend on knowledge of all policies regarding cancellation and changes. The following, from Judy Allen (Figure 3.4), are possibly “hidden” contract issues that should never be overlooked.

Figure 3.4          Contract Checklist

✓ Are there any charges for tables and chairs?
✓ Does anything need to be brought in for reception or dinner?
✓ Are there charges for clean-up?
✓ What overtime charges could apply?
✓ Are there specific firms you must work with?
✓ What are the charges for electrical power?
✓ Is staff union or non-union?
✓ How will this affect your labour and other costs?
✓ When are contracts and wage negotiations coming due?
✓ Are renovations being planned and, if so, what impact will they have on your event?
Figure 3.4 continued

- What time will you have access to the facility?
- What is the legal room capacity?
- Will furniture have to be removed? If so, are there any additional costs for this? 44

Finally, do not be intimidated. Services are being paid for, and association with a respected non-profit fundraiser provides high-profile publicity for the venue itself. It is valuable to everyone involved to make this the best event possible.

Setting Ticket Prices

After determining the probable cost for an organization’s event, also try to also determine the realistic number of attendees you can easily attract. Then, divide this number into the total expenses. It is essential to determine the costs per person to cover the event. Remember, an organization should set a goal of attaining at least 60 percent of the profit.

Therefore, it is also prudent to sometimes double the figures needed to cover expenses. From these figures, ticket price can be determined. For example, if the cost per person for reasonable attendance is $25 and the event itself costs a total of $7500, a $50 ticket price will net the charity $7500. If the tickets are $75, the charity nets $15,000, and so on. Finally, be sure to inform the organization’s members of any ticket sales requirements, deadlines by which reservations and payments must be made, rules regarding money handling, etc. In order to stimulate ticket sales, have support information available for members to distribute when attempting sales. Number all of the

44 Ibid, 48-50.
tickets and provide invitations and complimentary tickets to a few key dignitaries whose presence will enhance the event, and to the media.

Underwriting and Partnership

According to Harry A. Freedman, “Some 3,500 corporations spend $2 billion to $3 billion a year on sponsorships and donations to nonprofit groups.”\textsuperscript{45} This fact should help your organization feel relatively secure in successfully soliciting underwriting support.

When seeking funds for an event, it is important for arts organizations to develop strategic partnerships within the community. Funds are usually sought from banks, law firms, media (television and radio) and large corporations. Underwriting is most effective when used for larger items.\textsuperscript{46} Although it does not generate cash, a good partnership idea is a “media exchange” with local television and radio stations. The increased publicity will generate sales, which will result in additional income. Another major source of underwriting funds is corporate advertising and marketing budgets. Many companies, including restaurants, airlines, department stores and supermarkets can be good sources for underwriting for portions of events or even an entire event, in exchange for name recognition.

Corporations may be solicited by letter, which should include information about the charitable organization, its cause, and about the event itself. Though a letter rarely seals the deal, it stands a better chance of opening a conversation if it is signed by someone respected in the community—presumably a board member. Personal contact by

\textsuperscript{45} Ibid, 51.
\textsuperscript{46} Jackson, Interview by Author.
committee members will be a necessary next step. An added incentive might be an invitation to any underwriting event or party, which is usually a cocktail gathering with light refreshments, most often held at a board member’s home. The purpose of these parties is to strengthen personal commitments to the organization and the event. Potential underwriters must know how special the portion of the event for which you are seeking their assistance is.

In return for their generous support, there must be a promise to publicly recognize the business via the media and any other appropriate means. It is essential to be able to make a compelling case for why and how contributing to your event would benefit the donor as well as the charity. If there is any other added benefit to the company supporting your event, clearly define it. Whether it be tickets, preferred seating, signage, or program acknowledgements, put everything offered in writing. It is wise to compile a budget-based list of items the organization would like to have underwritten, complete with a space for potential estimated amounts before attempting to solicit funds. At this point in the planning process, concrete plans for the event have been established. Therefore, in Chapter IV, the focus shifts to how to effectively publicize your event.
CHAPTER IV

EVENT PUBLICITY AND TIMELINES

In order to have made a final decision on attempting an event, a thorough internal and external scan of the organization was necessary. The same information may be used to determine what would be the most effective approach to publicity for the event, as the pre-event image of the organization will certainly affect the outcome of the event itself. The marketing/public relations staff is often in charge of publicity for special events. However, experienced committee or board members can assist with this as well. Kelly suggests that in some extreme cases, “development officers who find an environment that is unresponsive. . .to their fund-raising efforts will turn to public relations officers and order them to fix or improve the image of the organization. . .”47

The importance of good event publicity is obvious—without it, acquiring an audience and making a profit for the organization would be difficult, if not impossible. The methods for generating publicity for special events are similar to general marketing and public relations, with the most important tool being word-of-mouth. Also, because an arts community’s social calendar often includes a multitude of events, it is essential to have the prospect of your organization’s event in potential donors’ minds well in advance of solicitation.

Knowing and Cultivating an Audience

In order to be successful in event planning, it is important to be aware of what the public wants. The first step towards ensuring good publicity for a special event is to know the audience. There are many ways to accomplish this task, perhaps the most effective being the targeting of ticket buyers, especially with a performance related event. Targeting ticket buyers simply means to recognize and cultivate those buyers who are most likely to become special event attendees, based upon their previous interest in the organization. Finding these individuals involves collaboration with those who market the organization’s programs, and those directly related to the sale of tickets. In any well run organization the ticket office will have captured and maintained a reliable database with accurate information about both subscriber and single ticket purchase names, addresses, any other demographical information, including race, gender, and socio-economic status (often gathered by separate surveys or research), and attendance histories. This information can then be used to focus resources on people who have a history of interest in your organization.

Cultivation is an on-going process and maintaining good relationships with the core group of arts event supporters and attendees is of utmost importance. Nevertheless, to earn a profit from a special event fundraiser, it is also important to develop a new donor/attendee pool each year. A logical starting point for the development of new patrons would be to examine four major groups to whom the event must be successfully unsolicited general arts supporters, who may or may not be acquainted with your organization and the general public.
Developing and Implementing a Successful Event Marketing Plan

If the organization’s marketing department is responsible for publicity, the designated board/volunteer committee should be given certain specific tasks to assist with the campaign. These tasks might be part of a standard marketing plan. However, if a volunteer committee is solely in charge of publicity, it is best to simply address the following individual elements of a marketing plan: the overall goal/objectives of the marketing campaign, identifying the event audience, details regarding the product (specific purpose of the event), place (facility), price (for attendees), promotional strategy (use of media, special promotions, etc.), and a process by which to evaluate the success of the implementation of the marketing plan.

When the event was chosen, in many ways, the audience was chosen as well. Still, the best way to encourage the maximum number of attendees from the four target groups is to compile a current media file and cultivate those relationships with contacts as well. The file should always include media contacts from local and regional newspapers, magazines, television stations, community calendars, radio stations and any e-mail digests or arts listings.

As for reaching major stakeholders (those with a vested interest in the success of the organization and its mission/goals) in the organization, it is wise to include information or to dedicate entire issues of the organizational newsletter/publication to the event. Once the media distribution file is compiled, press kits containing a press release, print clippings from any previous event, organizational information (brochures, etc.), sample nomination form (if applicable), and any other recent information should be sent.
As plans are made to distribute information to the more general contacts on the organization’s media distribution list, it is important to keep in mind that one of the most successful forms of event promotion is pre-event coverage in the form of television or print interviews with notable board members, honorary event chairs, or honorees. Other popular forms of pre-event promotion include photo opportunities with local personalities, the event chef/catering service, or those constituents the organization supports. Search for the element that makes each event uniquely newsworthy.

For print media, it is important to secure a feature in any section, be it education, social, news, etc. In order to do this, it is necessary to make and keep in contact with the appropriate editor(s) regarding event coverage. For radio and television, press kits may be sent, but it is also common practice to send a public service announcement (PSA). An example of a PSA can be found in Appendix 9. For all other forms of media, the press release is extremely important, because it is the first step in linking your organization and the general media. Therefore, time must be taken to carefully draft and proof the press release. A well-written event press release may, in some cases, alter the rules of general press release writing, mostly because it is now acceptable to try and sell the event by using carefully chosen attention-grabbing words and phrases. A public service announcement is a basic, condensed version of the press release, which includes all pertinent information. An example of a press release can be found in Appendix 10.

Acquiring a promise of media coverage is not the final step in securing ample coverage. If the organization’s event marketing efforts are successful in that media
coverage is anticipated, it is important to treat the media representatives well, especially if the coverage will take place directly from the event.

Prepare well in advance for extra invitations and seating for potential media personalities or reporters. Allen suggests that if members of the media are invited to cover only a certain segment, “be very clear about that in your invitation, so that they know what to expect.” These considerations might include: a media/press room for equipment storage and for in-depth coverage through interviews; parking for vehicles; and consideration of press or television deadlines.

Another creative special event marketing idea might include displaying posters or even objects related to the event theme around the immediate and surrounding communities. An aggressive marketer might create a scavenger hunt for these objects, sponsored give-aways, and work to arrange special guest appearances on local news or talk shows.

**Cause-Related Marketing**

One other major publicity option for your organization’s event is cause-related marketing, which is effective when used with a moderately-sized, well established and reputable arts organization. Cause-related marketing is, in many ways, comparable to corporate sponsorship, yet goes a bit further. Weinstein describes cause-related marketing as “The not-for-profit organization lend[ing] its name and good reputation to the corporation, while the corporation uses this tie to encourage sales of its goods and services and donates a portion of the increased sales to the not-for-profit.”

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48 Allen, 159.
49 Weinstein, 175.
For example, a restaurant or music store might donate a percentage of its daily sales for a specific period of time to support an organization’s cause. Weinstein goes on to say that, “Even grass-roots organizations can benefit from similar arrangements.”\textsuperscript{50} In fact, not-for-profit organizations of virtually any size could use this type of marketing arrangement to further an event or cause. If the organization decides that cause-related marketing is a viable option for your event marketing program, a few cautionary notes are in order. These include the following: before allowing anyone to use an organization’s logo and name, be sure to state the terms and conditions in a written agreement; the agreement should describe the nature of the promotion and give a clear description of the product or service being promoted; the agreement should have a start and stop date; the agreement should describe the placement of advertising and the geographic area covered; the agreement may contain a minimum donation amount.\textsuperscript{51}

**Event Timeline/Calendar**

To ensure future success, the event manager, volunteers, and staff should always maintain detailed records on each special event fundraiser. In order to complete the event in a timely manner, it is important to work with a reverse calendar/timeline in mind. The most important aspect of an event timeline is to ensure that enough extra time is allowed for any unforeseen obstacles and/or changes. Following is a template for use in establishing an effective timeline. Each event will dictate its own schedule, but the sample below will suggest an ideal calendar (Figure 4.1).

\textsuperscript{50} Ibid, 175.
\textsuperscript{51} Ibid, 175.
<table>
<thead>
<tr>
<th>Task</th>
<th>Person</th>
<th>Timeframe (months ahead)/Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determine Organizational Readiness</td>
<td>Board/Event Manager</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Research and Approach potential chairs</td>
<td>Event Manager/Board</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Determine Event Purpose</td>
<td>Event Mgr./co-Chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Select Theme</td>
<td>Event Mgr./co-chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Visit Possible Sites/Venues</td>
<td>Event Mgr./co-chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Form Committee and Subcommittees</td>
<td>Event Mgr./co-chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Research cost estimates</td>
<td>Committee</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Hold auditions</td>
<td>Committee</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Acquire bids for each element</td>
<td>Committee/co-chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Draft budget estimates</td>
<td>Event Mgr.</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Designate someone to oversee budget</td>
<td>Event Mgr./co-chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Nomination Forms or designate honoree</td>
<td>Committee</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Compile Invitation Mailing List</td>
<td>Committee</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Check conflicts and confirm date</td>
<td>Event Mgr.</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Acquire all other contracts</td>
<td>Event Mgr.</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Determine alternate event site</td>
<td>Co-chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Determine and pre-events</td>
<td>Event Mgr.</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>(publicity/underwriting parties)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confirm VIP’s</td>
<td>Co-chair</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Compile underwriting list</td>
<td>Committee</td>
<td>6-12 months/_________</td>
</tr>
</tbody>
</table>

**Figure 4.1 continued**

<table>
<thead>
<tr>
<th>Task</th>
<th>Person</th>
<th>Timeframe (months ahead)/Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seek underwriting sources</td>
<td>Committee</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Develop Marketing Schedule</td>
<td>Committee/Staff</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Select Photographer, arrange photos</td>
<td>Committee</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Develop Invitation Design (w/graphic Artist)</td>
<td>Committee/Mgr</td>
<td>6-12 months/_________</td>
</tr>
<tr>
<td>Event</td>
<td>Responsible Party</td>
<td>Timeframe</td>
</tr>
<tr>
<td>-------</td>
<td>------------------</td>
<td>-----------</td>
</tr>
<tr>
<td>Determine need for permits, etc.</td>
<td>Event Mgr.</td>
<td>6-12 months/__________</td>
</tr>
<tr>
<td>Monthly Committee Meetings Begin</td>
<td>Committee</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Review and Select invitation design</td>
<td>Event Mgr.</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Order Invitations, posters and tickets</td>
<td>Committee</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Sign Entertainment contracts</td>
<td>Event Mgr.</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Mailing and Poster Distribution lists</td>
<td>Committee</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Begin Major donor solicitation</td>
<td>Event Mgr./co-chair</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Arrange PSA’s, media sponsorship</td>
<td>Committee/Staff</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Arrange Tastings and set menu</td>
<td>Committee</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Written Confirmation of celebrity Participation/appearance</td>
<td>Committee</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Select and order awards</td>
<td>Committee</td>
<td>3-6 months/__________</td>
</tr>
<tr>
<td>Mail Invitations</td>
<td>Committee</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Distribute Posters</td>
<td>Committee</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Hold underwriting/press party</td>
<td>Event Mgr.</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Confirm media participation</td>
<td>Committee</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Press Kits mailed</td>
<td>Committee/Staff</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Follow-up on major donors/sponsors</td>
<td>Committee</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Secure permits, insurance, etc.</td>
<td>Committee</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Committee Chair Meetings begin</td>
<td>________________</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Event walk-through</td>
<td>Everyone involved</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Review Budget</td>
<td>Event Mgr./co-chair</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Any telephone follow-up solicitation</td>
<td>Committee</td>
<td>2 months/__________</td>
</tr>
<tr>
<td>Phone Follow-up to invitees</td>
<td>Committee</td>
<td>1 month/__________</td>
</tr>
<tr>
<td>Newspaper/Magazine ads placed</td>
<td>Committee/Staff</td>
<td>1 month/__________</td>
</tr>
<tr>
<td>Follow-up with media contacts</td>
<td>Committee/Staff</td>
<td>1 month/__________</td>
</tr>
<tr>
<td>Task</td>
<td>Responsible Party</td>
<td>Timeframe</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Confirm registration/hosts/volunteers</td>
<td>Committee</td>
<td>1 month/_________</td>
</tr>
<tr>
<td>Follow-up celebrity confirmation</td>
<td>Event Mgr.</td>
<td>1 month/_________</td>
</tr>
<tr>
<td>Assign tables</td>
<td>Event Mgr./co-chair</td>
<td>1 month/_________</td>
</tr>
<tr>
<td>Get guest food estimate for caterers</td>
<td>Committee</td>
<td>1 month/_________</td>
</tr>
<tr>
<td>Develop Presentation/draft script</td>
<td>Committee</td>
<td>1 month/_________</td>
</tr>
<tr>
<td>Arrange for VIP transportation</td>
<td>Event Mgr.</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Confirm hotel accommodations</td>
<td>Committee</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Confirm Security</td>
<td>Committee</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Confirm delivery schedules</td>
<td>Committee</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Prepare welcome packet for staff and VIP’s</td>
<td>Co-chair</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Confirm Event-setup with site</td>
<td>Event Mgr.</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Final numbers to caterer</td>
<td>Event Mgr.</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Train Volunteers/Staff</td>
<td>Committee</td>
<td>2 weeks/_________</td>
</tr>
<tr>
<td>Meet with committee chairs</td>
<td>Event Mgr. Co-chair</td>
<td>1 week/_________</td>
</tr>
<tr>
<td>Designate 2-3 volunteers as emergency staff</td>
<td>Event Mgr.</td>
<td>1 week/_________</td>
</tr>
<tr>
<td>Give table assignments to hosts</td>
<td>Committee</td>
<td>1 week/_________</td>
</tr>
<tr>
<td>Distribute scripts to participants</td>
<td>Event Mgr.</td>
<td>1 week/_________</td>
</tr>
<tr>
<td>Establish petty cash fund for tips and emergencies</td>
<td>Event Mgr.</td>
<td>1 week/_________</td>
</tr>
<tr>
<td>Schedule rehearsals for day of event</td>
<td>Event Mgr.</td>
<td>1 week/_________</td>
</tr>
<tr>
<td>Hold final walk-through of venue</td>
<td>Event Mgr.</td>
<td>1 week/_________</td>
</tr>
<tr>
<td>Write out all payment checks</td>
<td>Treasurer/Event Mgr.</td>
<td>1 day/_________</td>
</tr>
<tr>
<td>Purchase/Wrap all thank-you gifts</td>
<td>Event Mgr./Staff</td>
<td>1 day/_________</td>
</tr>
<tr>
<td>Set up for event</td>
<td>______________</td>
<td>Day of Event</td>
</tr>
<tr>
<td>Hold rehearsal</td>
<td>______________</td>
<td>Day of Event</td>
</tr>
</tbody>
</table>
In addition to the general event timeline/checklist, an individual committee timelines should be created. An example of an invitation committee calendar follows (Figure 4.2).

<table>
<thead>
<tr>
<th>Task</th>
<th>Person Responsible</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guest List Development</td>
<td></td>
<td>6-7 months</td>
</tr>
<tr>
<td>Invitation Design</td>
<td></td>
<td>6-7 months</td>
</tr>
<tr>
<td>Details to Designer</td>
<td></td>
<td>4 months</td>
</tr>
<tr>
<td>Mailhouse booked</td>
<td></td>
<td>3-4 months</td>
</tr>
<tr>
<td>First Review of design</td>
<td></td>
<td>3-4 months</td>
</tr>
<tr>
<td>Second review</td>
<td></td>
<td>3 months</td>
</tr>
<tr>
<td>Invitations to Printer</td>
<td></td>
<td>3 months</td>
</tr>
<tr>
<td>Envelopes sent to mailhouse</td>
<td></td>
<td>2 months</td>
</tr>
<tr>
<td>Invitations mailed to list A</td>
<td></td>
<td>1-2 months</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task</th>
<th>Person Responsible</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIP Passes mailed to guest</td>
<td></td>
<td>1 month</td>
</tr>
<tr>
<td>list A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>RSVP cut-off to List A</td>
<td></td>
<td>1 month</td>
</tr>
<tr>
<td>Invitations Mailed to List B</td>
<td></td>
<td>1 month</td>
</tr>
<tr>
<td>RSVP cut-off to List B</td>
<td></td>
<td>2 weeks</td>
</tr>
<tr>
<td>VIP Passes mailed to guest</td>
<td></td>
<td>2 weeks</td>
</tr>
<tr>
<td>List B</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

52 Allen, 19.
CHAPTER V
EVENT FOLLOW UP

According to Kelly, “A general conceptual understanding of effectiveness in fund raising includes raising the most money you can with the least amount of expenditures and doing so in such a manner that enhances the likelihood both that current donors will continue their support and new donors will provide new support.” With this in mind, when the event over, the first task is to make sure every conceivable person or organization has been thank. The second is to rigorously evaluate the success of its special event. Because of the philanthropic and community-oriented nature of not-for-profit arts organizations, profit is only one way by which to measure the success of an event. It is also important to evaluate how well the event supported the organization’s mission, if new supporters were attracted to the organization, and finally, whether or not it is a viable option in the future.

Giving Thanks

There are many tangible ways to show gratitude for an event well-done, and it is important for the Event Manager to keep a store of petty cash, or to create a separate fund in order to do so. One of the easiest and most resourceful ways is for the Event Manager to host an organizational appreciation party.

53 Kelly, 426.
All volunteers, committee members, and board members should be invited. This type of gathering might be a cocktail party held a few weeks following the event. Whatever the nature of the gathering, tokens of appreciation may be presented.

An appropriate memento for a special event might be a scrapbook or collage of photos, along with any press clippings from the event. The person’s name, name of the event, and date might be included on the front of the scrapbook as well. Another idea, especially for major donors, is to create a memento and send it, accompanied with a personalized signed, thank-you note that indicates the amount given, and (if appropriate), how the gift will be used. It would also be wise to have any organizational publications devote a substantial amount of space to event coverage, and to send a copy of the publication along with thank-you packages. Consider extending volunteers and donors an invitation to an annual meeting. With any form of thanks for assistance at any level, a personal touch is the most important factor.

Perhaps the best way to examine and judge overall event success is by completing a post-event evaluation. A good time to do so is at the appreciation gathering. Following is a model of the types of questions that might be asked during the evaluation (Figure 5.1).

Figure 5.1  Post-Event Evaluation

<table>
<thead>
<tr>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Was it a good idea? – Was your organization ready, or overzealous in its efforts?</td>
</tr>
<tr>
<td>2) Did you successfully reach the target audience?</td>
</tr>
<tr>
<td>3) Was the time of day appropriate?</td>
</tr>
<tr>
<td>4) Did the event develop into a fund or friend raising event- or both?</td>
</tr>
<tr>
<td>5) What was the attendance?</td>
</tr>
<tr>
<td>6) Did the organization achieve its fundraising goal?</td>
</tr>
</tbody>
</table>
Figure 5.1 continued

7) Were new donors acquired?  
8) Was the timeline efficient?  
9) Was the time of year a good choice?  
10) Was registration easy?  
11) Were guests greeted well?

**Finance/Budget**

1) Did you stay within the given limits?  
2) What was the total cost of holding the event?  
3) Was the invested amount consistent with the organizational image and goals?  
4) Was the amount raised consistent with the type of event held?  
5) How was the cash flow?  
6) Was every transaction recorded, in order to ensure that the organization collects all monies due to it?  
7) Was the payment schedule adequate?  
8) Were all contracts negotiated in order to maximize profit?  
9) Is there a way to cut future expenses?  
10) Were there any unexpected expenses?

**Management**

1) Was the Event Coordinator/Manager able to successfully handle the event?  
2) Were they readily available if any problems arose?  
3) Did he/she properly delegate and follow-up on delegated responsibilities?  
4) Did he/she seem to need any additional help?

**Committees**

1) Did they complete assignments in a timely manner and within budget?  
2) Did the chairperson communicate regularly with the events manager?  
3) Did they ask for guidance/assistance when needed?  
4) Were there enough/too many people on each committee?  
5) Did the committees meet regularly enough/too often?  
6) Have any new leaders emerged from within the committee?  

**Site Location**

1) Did the site work well with the type of event?  
2) Was there enough space to accommodate all guests?  
3) What size will be needed for next year?  
4) Was weather an issue?  
5) Were there problems with any items provided by the venue?

**Presentation**

1) What was the effect of the entertainment?  
2) Were people inclined to dance?

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54 Freedman, 223.
Figure 5.1 continued

3) Was the audio/visual adequate?
4) Were you able to get items underwritten (entertainment, etc.)?

**Publicity**

1) How much media coverage did the event receive?
2) Do you need to update the mailing list?
3) Was everything done in a timely manner?
4) If handled by staff, did they need more assistance?
5) If handled by volunteers, did they need more guidance?
6) Were you happy with the invitations?

**Food and Beverage**

1) How did it taste?
2) How was it presented?
3) What was the quality of the service?
4) Did guests have any complaints?
5) Was the menu diverse enough to accommodate those with dietary restrictions?
6) Was there enough for everyone?
7) Is there a way to save money in this area in the future?

Finally, keep an accurate record of past and present special event performance. Good record keeping ensures that accurate information will be kept for future use – primarily, in the case of heavy organizational/volunteer turnover or a change in event managers. It is also essential in avoiding mistakes on future events. These records might take the form of a “result chart” such as the one presented in Figure 5.2.

**Figure 5.2**  **Sample Post-Event Result Chart**

<table>
<thead>
<tr>
<th>SPECIAL EVENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Special Event</td>
</tr>
<tr>
<td>Ticket Sales and other Revenues</td>
</tr>
<tr>
<td>Sponsorships</td>
</tr>
<tr>
<td>Income Total</td>
</tr>
</tbody>
</table>
Some interesting and important general items for future consideration can be found in special event fundraising expert, Gerald M. Plessner’s “Approximately Ten Commandments of Special Event Fundraising.” A summary list follows:

1) The response card must fit inside the response envelope.
2) The entertainment must be auditioned.
3) There shall be an honoree for every special event – even a garage sale.
4) Thou shall count the tables and chairs before the first guest arrives.
5) The price of the ticket must provide net income to the causes.
6) Publicity will not be expected to sell one ticket, for only people sell tickets.
7) The honoree must genuinely deserve the tribute, and the chair must be a person of stature.
8) The honoree and the chair must know about the cause—even if they learn about it only when they are recruited.
9) The event must be of the quality expected for the ticket price. Thou shall not take your donors for granted!
10) A lousy program will not hurt this year’s participation, but as surely as night follows day, it will kill you next year.
11) Promises count for nothing, but cash (and sometimes written pledges) do.\footnote{Weinstein, 170.}

Special events are a unique combination of celebration and support. They introduce new friends to good causes. And, when done right, they make money. Opportunities abound for new, creative events in virtually every community!
CHAPTER VI

SUMMARY

Gone are the days of a community’s waiting for that one, big social charity event to take place. Often without realizing it, community/arts supporters gather for several events per year or season. From the usual gala, to golf outings and suppers, to tournaments, special events have definitely emerged as more than just a fundraising tool. They are also a means by which to reach out and build relationships within the arts community. Perhaps, more importantly, the days have also passed when “ladies” guilds within an arts organization met during their spare time and donated their own resources to plan an event. Recent years have proven that expertise is required in development, budgeting and securing sponsorship. Flawless public relations skills are also required, in order to successfully complete any event for an arts organization. Indeed, the area of special events has become a viable profession, and events themselves should be recognized as an integral component of an arts organization’s marketing and community relations plan.

This guide is a “useful” tool, designed to help an arts organization of any discipline determine whether or not it is ready to attempt an event, and to identify the types of events that would be effective in meeting its particular goals. It is hoped this guide may
serve as a valuable resource for any symphony, opera, arts council, or the many other arts organizations that wish to further their success with the use of special events.

For more information on choosing and implementing special events, the following organizations would be very helpful:

1) American Council for the Arts, New York, New York – has reference library that includes information on holding arts events.


3) Association of Fundraising Professionals (AFP), Alexandria, Virginia – provides guidance, assistance, and professional development opportunities to fundraising professionals. This organization also publishes a quarterly journal with useful information on varying aspects of fundraising and development, including special events.
BIBLIOGRAPHY


Descovich, Amanda, Special Events Manager, New York City Opera, interview by Yolanda F. Johnson, 22 October 2001, Akron, Ohio, via telephone.


Jackson, Mary Ann, Fundraising and Event Specialist, interview by Yolanda F. Johnson, 28 September 2001, Akron, Ohio, tape recording, Akron Area Arts Alliance, Akron, Ohio.


Raynor, Jessie, Administrative Director, Akron Area Arts Alliance, interview by Yolanda F. Johnson, 28 September 2001, Akron, Ohio, tape recording, Akron Area Arts Alliance, Akron, Ohio.


APPENDICES
October 22, 2002

Yolanda Johnson
10610 E. 66" Street South
Apt. #118
Tulsa, OK 74133

Dear Ms. Johnson:

The University of Akron’s Institutional Review Board for the Protection of Human Subjects (IRB) completed a review of your application for continuing review entitled "A Complete Guide to Planning Special Events for Arts Organizations".

The protocol qualified for Expedited Review and was approved on October 22, 2002. The protocol represented minimal risk to subjects. Additionally, the protocol matched the following federal category for expedited review:

- research on individual or group characteristics or behavior or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies

This approval is valid for up to one year from the approval date or until modifications are proposed to the current project protocol, whichever may occur first. In either instance, an Application for Continuing Review must be completed and submitted to the IRB.

Please note that within one month of the expiration date of this approval, the IRB will forward an annual review reminder notice to you by email, as a courtesy. Nevertheless, please note that it is your responsibility as principal investigator to remember the renewal date of your protocol’s review. If your project is funded, failure to comply with IRB requirements could jeopardize your continued funding.

Please retain this letter for your files. If the research is being conducted for a master’s thesis or doctoral dissertation, you must file a copy of this letter with the thesis or dissertation.

Sincerely,

[Signature]
N. Margaret Win an, Ph.D., IRB Chairperson

Assigned Research # 20010930-2

Cc: Neil Sapienza, Department Chair
Randy Pope, Advisor
APPENDIX B

SAMPLE OBJECT-RELATED AUCTION DONATION FORM FOR ARTISTS

This form can be used to solicit city-wide participation, by allowing different artists to create a unique version of any given event-related object— in this case, boxes. Also, include an identical form as a “receipt” for the artist’s own records.

Akron Area Arts Alliance Arts Alive! Celebration
“Out of the Box Auction” Participation Form

_____ Yes, I am delighted to showcase my creativity and help raise funds for AAAA projects by creating a decorative box to be auctioned at the Arts Alive Celebration on Sunday, November 11, 2001.

Please print (please return form by Friday, August 17, 2001):

Artist’s Designer’s Name__________________________________________________
Address________________________________________________________________
Telephone (AM)____________________________  (PM)________________________

Box Design Specifications

✓ Your box should be a three-dimensional container—a lid is optional.
✓ Your box can be functional or purely decorative.
✓ Box shape is decided by the artist/designer (square, rectangle, round, etc.)
✓ Materials used are decided by artist/designer (painted wood, paper, metal, etc.)
✓ Completed boxes must be delivered by **Friday, October 26, 2001.**

Size Categories Please check the size of box you are creating.

_____ Small box – 4 to 12 inches in height and width maximum
_____ Medium box – 12 to 24 inches in height and width maximum
_____ Large box – 24 to 48 inches in height and width maximum

Composition/Decoration Materials

_____ Painted_____ Mixed Media _____ Wood _____ Metal
_____ Paper _____ Glass _____ Ceramic

Do you need assistance purchasing materials?  ___ Yes ___No, I will donate them.

Please send this completed participation form to:
Akron Area Arts Alliance
80 West Bowery Street, Suite 105  Akron, Ohio  44308
APPENDIX C

SAMPLE AWARDS NOMINATION/APPLICATION FORM

Since every event should have some type of honoree, the appropriate committee must create an appropriate nomination/application form.

Akron Area Arts Alliance
   Arts Alive!
   Awards Celebration

Nominee
   Name ______________________
   Org. ______________________
   Title ______________________
   Nominee’s Phone __________

Award Categories (check one)
   _____ Outstanding Artist Award
   _____ Visual Art
   _____ Music
   _____ Dance
   _____ Theatre
   _____ Arts Business Award
   _____ Government Leadership Award
   _____ Arts Educator Award
   _____ Rising Young Star

Why should this nominee be given an award?
   Please attach, if necessary.

Nominated by
   Name ______________________
   Org. ______________________
   Title ______________________

Contact – Akron Area Arts Alliance
   Administrative Director, if you have questions about the form or appropriate support material.

Selection Committee – is made up of arts and culture professionals.

Support Material – Resumes, letters of support, and newspaper/magazine articles, etc.

Deadline – Form postmarked by:
   August 1, 2001

You may photocopy this form to nominate others.

**This is not a ballot.**

Duplicate submissions will not increase a nominee’s chances of being awarded recognition.
APPENDIX D

SAMPLE SPECIAL EVENT POSITION STATEMENT

Akron Area Arts Alliance

Special Event Position Statement

October 5, 2000

Mission
To establish a prestigious, unique, exciting and fun annual fundraising event that will:
1) Celebrate and encourage community support for the arts by honoring people who already do so
2) Showcase the talents of Akron area artists and performers
3) Provide and on-going, dependable source of income to support the operations of the Akron Area Arts Alliance

Goals
The goals of this special event are to:
1) Produce $25,000 income for AAAA
2) Increase visibility throughout the community
3) Award individuals/groups who have enriched the community through the arts and other avenues

Date, Location and Ticket Prices
1) Planned for Saturday, November 17, 2001
2) Akron Center building
3) Two tiered ticket prices, consisting of Patron and Supporter

Outline
1) The event will be built around awards presentations to community supporters of the arts in the following possible categories:
   Visual Arts
   Music
   Dance
   Theater
   Business Support for the Arts
   Government Leadership in the Arts
   Arts Educator
   Rising Young Star

2) The event will include the “Artists Think Out of the Box” silent auction of decorated boxes, created by professional artists and community celebrities
3) There will be entertainment as guests enter the event, and throughout the evening
APPENDIX E

SAMPLE SPECIAL EVENT FACT SHEET

July 15, 2001

Be a part of the 1st Annual

Arts Alive! Awards Celebration

Sponsored by the Akron Area Arts Alliance

As the collective voice for 36 of the major arts and cultural organizations in local counties, the AAAA is proud to announce that the 1st Annual Arts Alive Awards will be held Sunday, November 11, 2001. The event will honor individuals and groups that enrich our lives by their participation in arts and cultural activities. It promises to be a fabulous evening where we shine the spotlight on those who help our community sparkle with creativity.

We ask that you be a part of the arts by nominating worthy candidates in the following categories:

1) Outstanding Artist
   Visual, Music, Dance and Theatre
2) Arts Volunteer
3) Arts Patron
4) Arts Outreach
5) Arts Business Support
6) Government Leadership
7) Arts Educator
8) Rising Young Star
9) Collaborative Project

Guidelines:

1) Nominations must be postmarked by August 15, 2001
2) You may nominate more than one person/group in more than one category
3) Support materials are encouraged

About AAAA:

Founded in 1991, the Akron Area Arts Alliance mission is to:

1) foster communication and collaboration among cultural organizations
2) generate greater awareness and participation in the arts and humanities in all segments of the community; and promote the value of the arts and humanities to local governments.
3) For further information, contact the Administrative Director at 330-321-4545.
APPENDIX F

COMMITTEE CHECKLIST

1) Assess your manpower resources, then figure out how many more you will need, encouraging those already on board to help get others involved.

2) Organize your honorary committee, confirming each person’s involvement and responsibilities in writing.

3) Organize working committees, confirming each person’s involvement and responsibilities in writing.

4) Have working committee meet once a month until six weeks before an event, then have brief weekly meetings.

5) Chairpersons of each committee should meet with the event managers at least once a month up to six weeks before an event, then meet weekly.

6) Secure volunteers to help with last minute tasks.

7) Ensure that there are enough people to handle follow-up phone calls in the last weeks before the event.

8) Remember to thank all committee members at every meeting and to follow up after the event with a thank-you note, plaque, photos, or small gift.
APPENDIX G

COMMITTEE ROSTER LAYOUT AND CELEBRITY LIST

Committee Roster

Name of Organization

Special Event Committee

Name of Committee

Name                                      Home Phone Number

Address                                   Fax

City, State and Zip                       E-mail

Cell Phone Number                        Business Phone Number

Celebrity List

If your budget allows, definitely attempt to enlist a major personality for your event. If not, solicit the support and participation of local celebrities in the following areas for assistance in many areas, including committee assignments and presentation:

Education – Superintendents, principals and university presidents

Music – local performers, conductors and bands

Food – chefs and restaurant owners

Government – Representatives from all levels, especially the Mayor

Interior Designers and Florists – well known, with several major accounts within the city

Business – executives from banks and other area corporations/industries

Media – television, radio and print personalities
APPENDIX H

SAMPLE MENU IDEA LIST

**Breakfast**

**Buffet:** Scrambled eggs, with the option of added cheese, bacon, sausage, hash brown potatoes, pancakes, toast, fresh fruit, individual yogurts, cereal (hot and cold), juices, teas, coffee, assorted jellies, butter, honey

**Sit down:** Omelet, fresh fruit, juice, coffee, tea, assorted pastries, pancakes, bagels, country fried potatoes, cream cheese

**Brunch**

**Usually buffet:** Fruits, pastries and assorted rolls, salad, light meat, such as chicken or turkey, tea, coffee, punch

**Lunch**

**Buffet:** green salad, with assorted types of lettuce, pasta salad, vegetables and fruit- both with dip, broiled chicken breasts, rice pilaf, rolls and breads, punch, tea, coffee

**Sit down:** soup (hot or chilled), light chicken dish, fruit salad, breads and rolls, cheeses, punch, tea, coffee, petit fours, pie

**Dinner**

**Buffet:** Salmon, chicken, salad, new potatoes, chocolate-dipped fruit, signature dessert, coffee, tea, merlot and chardonnay

**Sit down:** Salad greens (field and romaine), puffed pastry cheese “straws” on the salad, baked feta cheese croquettes, broiled chicken, crab cakes, vegetable bundles, roasted fingerling potatoes (a variety of colors), variety of rolls, punch, tea, coffee, appropriate wines, petit fours, signature dessert

**Themed Menu: Oriental:** Sushi and Sashimi, Chinese chicken salad, miniature egg rolls, wontons, crab rangoon, teriyaki beef with vegetables, fried rice, almond and fortune cookies
APPENDIX I

SAMPLE PRESS RELEASE

Note: Press Releases should always appear on the organization’s official stationery. Also, if the release is over one page long, the word “-MORE-” should appear in bold, centered at the bottom of the page. At the end of the release, it is common practice to place three number symbols “# # #”, with one space between each, centered, beneath the final line of text.

Press Release

For Immediate Release

Contact Information

(name, title and phone number/e-mail address)

Akron Area Arts Alliance Announces a Call for Nominations for the First Annual Arts Alive! Awards!

Akron, Ohio - The Akron Area Arts Alliance (AAAA) is now accepting nominations for the inaugural year of its Arts Alive! Awards, which will honor area artists, performers, musicians, patrons and supporters for their accomplishments and contributions to our vibrant arts community. Nominations are being accepted for prospective awards in the following categories: Outstanding Artists in Music, Dance, Theatre and Visual Arts; Arts Volunteer; Arts Patron; Arts Outreach; Business Support for the Arts; Government Leadership in the Arts; Arts Educator; Rising Young Star and Collaborative Arts Project. Nominations must be Postmarked by August 15, 2001.

The awards will be presented at a gala celebration on Sunday, November 11 at the Crowne Plaza Quaker Square in downtown Akron. This special, new event...gala evening will include a colorful cocktail hour of arts entertainment, a grand dinner highlighting the culinary arts, a dessert extravaganza...and our unique Out of the Box auction of artist-designed decorative boxes.

The goal of Arts Alive! Is to recognize and celebrate Greater Akron’s active and talented arts community and to support AAAA and its projects. (List chairs, especially if prominent board members). For more information, call the AAAA office at 330-376-8543 or log onto the AAAA internet site at www.akronareaarts.org.
APPENDIX J

SAMPLE PUBLIC SERVICE ANNOUNCEMENT

PUBLIC SERVICE ANNOUNCEMENT
FOR IMMEDIATE RELEASE
Date: October 20, 2001
Contact: Administrative Director
(330) 433-9939

Akron, Ohio -- The Akron Area Arts Alliance (AAAA) is celebrating its first ever *Arts Alive! Awards*, which will honor area artists, performers, musicians, patrons and supporters for their accomplishments and contributions to our vibrant arts community. Nominations are now being accepted for prospective awards in the following categories: Outstanding Artists in Music, Dance, Theatre and Visual Arts; Arts Volunteer; Arts Patron; Arts Outreach; Business Support for the Arts; Government Leadership in the Arts; Arts Educator; Rising Young Star and Collaborative Arts Project. Nominations must be Postmarked by August 15, 2001.

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The goal of *Arts Alive!* Is to recognize and celebrate Greater Akron’s active and talented arts community and to support AAAA and its projects. (List chairs, especially if prominent board members). For more information, call the AAAA office at 330-376-8543 or log onto the AAAA internet site at [www.akronareaarts.org](http://www.akronareaarts.org).

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