

AN ANALYSIS OF FINANCIALLY SUCCESSFUL SPECIAL FUNDRAISING
EVENTS

A Thesis

Presented to

The Graduate Faculty of The University of Akron

In Partial Fulfillment

of the Requirements for the Degree

Master of Arts

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August, 2013

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EVENTS

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Thesis

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ABSTRACT

The research project focuses on an analysis of financially successful special fundraising events. The research will examine and identify specific strategies by type of events, organizational structure, and desired outcomes. Fundraising is a critical component of nonprofit organizations. An organization's efficiency strategies can help or hinder the sustainability of its mission and purpose. There are various approaches for fundraising and also a number of challenges nonprofit organizations encounter as they pursue fundraising initiatives. In nonprofit art organizations, special events are influential instruments identifying resources and supporting the organization's primary mission. Special event fundraising provides an organization valuable community exposure, capitalizing on a captive audience of arts-interested, potential donors. The research will also examine event processes and practices needed to successfully impact fundraising events. The research includes key elements, including goal setting, planning, event organization, and administration all coordinated to achieve and maximize the event success.

ACKNOWLEDGEMENTS

I would like to express my sincere appreciation to several individuals who have been incredibly supportive in the development of my thesis and throughout my entire academic experience during my Masters in Arts Administration:

Thanks to Randy Pope, my academic advisor, for believing in me and for offering me a full assistantship into the program. I will always be grateful for his continued and unwavering support.

Thanks to Kit Kelly and Neil Sapienza for their support and for agreeing to participate on my committee. Thanks for providing me a greater understanding of fundraising special event best practices, for always encouraging me to ask the difficult questions, and relentlessly keep striving for desired results.

Thanks to Rod Bengston for coaching me through everything I know about becoming a gallery manager and for giving me the opportunity to research areas of interest.

Thanks to all my family and friends for their love and belief in my abilities enabling my inspiration and passion for the arts.

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CHAPTER I

INTRODUCTION

My research is based on the assumption that charitable fundraising and donor development are foundational components of every non-profit organization's sustainability and ability to achieve its mission. The essential, defining characteristic of any nonprofit organization is its basic intent to provide service to the public without sufficient resources, it is improbable that the organization will fulfill its mission (Worth 3-5). Although nonprofit organizations may share the same fundamental purpose, the distinct approach each develops to meet their individual, respective missions, in terms of programming, and resource development, reveals institutional challenges unique to each.

Whether a member of the professional staff or member a volunteer board of directors, articulating a clear understanding of the organization's mission, available resources, needs, and level of community engagement is essential. This articulation must occur before the organization considers embarking on any meaningful and potentially successful fundraising undertakings.

Nonprofit organizations are also remarkable in how they develop administrative and management structures to facilitate organizational effectiveness and meet their goals. While many small to mid-sized organizations have limited staff and relatively basic approaches to cultivating donors, more established organizations may have multifaceted

development strategies built on years of experience and well-developed brand recognition in their communities. This contributes to their achievement of substantial fundraising goals. In the book *Best Practices of Effective Nonprofit Organizations*, Philip Bernstein states, typically, these organizations obtain greater financial and volunteer support and entice and retain outstanding professional staffs (1).

Bernstein goes on to point out that few organizations, no matter how successful, are passively satisfied with their achievements. He points out that the nonprofit sector is not complacent. Even the most productive organizations do not rest on past successes. A successful organization is aware of the need to compare and analyze opportunities and threats to develop and remain competitive in the industry (2-3). Both modestly successful organizations and well-established and apparently successful organizations face increasingly troublesome financial pressures. This phenomenon is particularly true in the arts, which face dwindling audiences, competition from electronic media, an unprecedented amount of competition for charitable dollars, and an international economic climate that does not encourage charitable giving.

Among traditional elements of fundraising strategies has been the “special event.” Special events, which, for these purposes, refer to gathering of people (often identified as peers) who come together in support of a charitable cause lending their attendance and financial support. What they all have in common is that they provide a social event for the attendees. There is, however, unlike many other social events, the presumption that this special event is in support of a “good” cause. A special event provides an opportunity to develop new stakeholders, and to strengthen relationships of current supporters.

While the positive potential inherent in special events has been proven over time, they are not without risks. The event itself must reflect the public's perception of the organization in the community, building the organizational brand rather than putting it at risk. Event planning is not simply party planning. It is also immensely time and resource consuming. Unless special events result in tangible benefits related to specifically determined goals, they may be an unjustified waste of resources. Another challenge of special events is the heavy reliance on volunteers, they must be properly prepared to execute a complex event. A failed event, whether it is determined by financial goals not met, or by the caliber of the event itself, can do an organization serious public damage, and may threaten programming itself.

Ilona Bray, J.D., author of *Effective Fundraising for Nonprofit Real-World Strategies That Work*, deals with this subject when she indicates that many experts recommend that one of the first questions an organization should ask when considering a potential special event is, "Will this be a fundraiser or a friendraiser?" These goals are not mutually exclusive. No special event should lose money. The concept of a special event is to develop relationships with potential stakeholders, regular ticket purchasers, donors, and/or volunteers. This is a valid goal. Friendraisers are designed to increase organizational or programmatic visibility in the local community, as well as recognize and strengthen relationships with current donors. In any case, Bray suggests that the goal of every special event should be: "**SMART**" Specific, Measurable, Achievable, Realistic and Time bound (243).

This research focuses on an analysis of financially successful special fundraising events. It will examine and identify specific fundraising strategies, types of events,

organizational structures, and desired results. The research is supported by field expert interviews with professionals who have successful histories in nonprofit fundraising and special events specifically. The researcher intends to provide a basic understanding of fundraising strategies, including special events planning and the practices needed for planning of successful non-profit fundraising events. Therefore this project is presented in four components: fundraising strategies, special event planning, budgeting/financial analysis, and evaluating results.

CHAPTER II

A BRIEF OVERVIEW OF SOURCES OF CHARITABLE GIVING IN THE UNITED STATES

In the United States, fundraising is an ongoing activity for non-profit organizations. In every case the ability of an organization to fulfill its mission is directly connected to the level and dependability of resources. Fundraising, collecting money for a specific purpose, is one component of the broader term *development*. Development is inclusive of more than financial concerns, although that is the primary subject of the end result. It also includes the concept of the development of complex, strong, and loyal relationships with stakeholders, those people who have a vested interest in the success of the organization (Weinstein 4-5). Development officers or fundraisers raise income in a variety of ways and from diverse sources. Goettler emphasizes the importance of identifying all potential sources of revenue before establishing organizational and programmatic budgets (121-125). These sources include earned income such as ticket sales, fees charged for services, or facility rental. However, in the case of development officers, the object is to develop sources of charitable support. The *Giving USA Report* is a primary source of data on charitable giving in the United States. Headquartered in Glenview, IL, the Giving USA Foundation compiles and publishes data and trends in the philanthropic sector. Not only does it provide a biennial analysis of charitable giving, it

also publishes quarterly newsletters on topics related to philanthropy (qtd in Giving USA).

The 2011 *Giving USA Report* identifies four types of donors: individuals, foundations, charitable bequests, and corporations. The Report calculates that total charitable giving in all areas measured amounted to \$290.89 billion, which is an increase of 3.8 percent (2.1 percent adjusted for inflation) compared to the revised estimate of \$280.30 for 2009. An analysis of charitable contributions by source is as follows:

- **Individual Giving:** In 2010 giving by individuals was estimated at \$211.77 billion, a 2.7 percent increase over 2009 (1.1 percent adjusted for inflation). This figure represents 73 percent of total giving to charities in 2010.
- **Charitable Bequests:** In 2010 charitable bequests were estimated to be \$22.83 billion, which is 8 percent of total giving.
- **Corporate Giving:** In 2010 corporate giving in the United States is estimated at \$15.29 billion (8.8 percent increase adjusted by inflation in comparison to 2009), which represents 5 percent of the total giving to charities.
- **Foundation Grants:** Data from 2010 indicate that charitable foundations generally favor giving to support capital funds, demonstration projects, and educational programs. Foundations made grants of approximately \$41.00 billion in 2010 (14 percent of total giving). According to data from the Foundation Center, family foundations gave approximately \$19.50 billion. The combination of charitable giving by individuals, bequest, and family foundations amounted to approximately \$254.10 billion in 2010 (87 percent of total).

An additional source of funding not categorized by USA reports is “Government Giving.”

- **Government Giving:** Government funding can include grants from local, state, and federal agencies. Statistics regarding government grants are difficult to analyze because they may include everything from art commissions and education departments to public services agencies and municipal humane societies. However, it is estimated that as much as 12 percent of nonprofit support nationwide comes from the government (Bray 345).

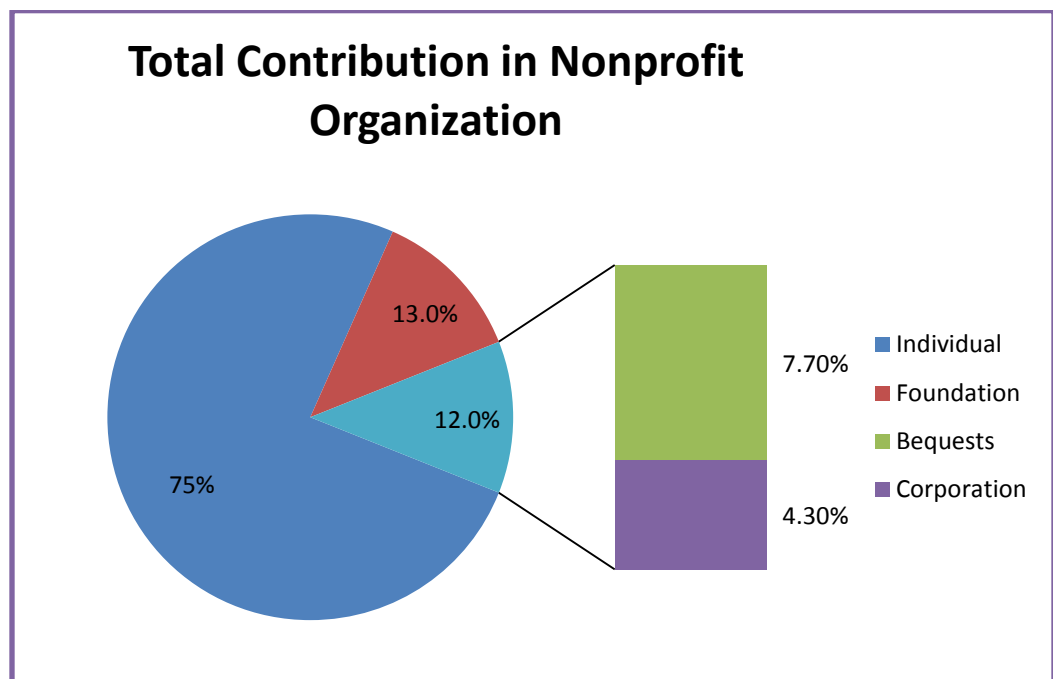


Figure 2.1 Giving USA Report 2010.

CHAPTER III

FUNDRAISING STRATEGIES

Although the subject of this thesis is to look closely at the place of *special events* in successful fundraising planning, it is important to understand basic tools that have been traditionally available to fundraisers and the new tools that have become available in the twenty-first century. A brief discussion of the major elements that make up the traditional tools of fundraising follow:

- **Direct Mail** is, fundamentally, a marketing tool. Direct mail, which results in hard copy being delivered directly to a potential donor, is a useful tool because it ends up, however briefly, in the home and in the hands of a potential donor. It can deliver a clear message and include an “action step” that will prompt the recipient to what is suggested. The quality of direct mail pieces can also be effective in establishing a cohesive “brand” for an organization.
- **Telemarketing** provides a slightly more personal element to the solicitation, and allows for more response from the potential donor. The challenge of this technique is effectively train volunteers to make a compelling case on behalf of the organization; or, if professional fundraisers are employed, even simply personalizing the message is a challenge. Another challenge of this technique is the projection of credibility, an issue that often results from hiring professional

fundraisers. Therefore, when engaging professional fundraisers, make sure that is registered with the Charities Bureau. Furthermore be sure to carefully read the final written contract before signing.

- **Social Media** as a tool for fundraising is the most significant development in the twenty-first century. Social media allows organizations to engage in a public conversation with followers with whom they hope to create long-term relationships. Social media has emerged as one of the most widespread points on the technology spectrum. Sites such as MySpace, Facebook, Twitter, and Instagram have made it possible to connect with clients on a one-on-one basis. Social media reaches a large audience inexpensively and allows you to market your mission with more marketing opportunities in more marketing niches. Social media offers more fundraising choices, such as partnerships with e-commerce sites, charity auctions, direct donations, selling web space for advertising and corporate sponsorship, buying or trading web space or links, and selling products and services. Social media can increase new donors, retention and renewal rates, and loyalty. Although social media offers countless benefits it is not without some barriers such as; cost of hardware, software, network connections, consultants, staff time, training and continuous updates. Social media marketing also has potential governmental regulations and fees, impacting both charitable giving and professional solicitation.
- **Peer to Peer Cultivation** is essential in the identification and securing of major gifts. Every organization sets its own standard for what is described as a “major gift.” From a fundraising standpoint, major gifts usually are the result of long-

term cultivation. They require a personal relationship with the potential donor, probably with someone considered a peer. Major gifts may include real estate or estate planning. The comparative value of the final, realized gift to other *major* gifts may be relatively small, but the investment of time and stewardship are usually equal and sometimes greater.

- **Corporate Partnerships** are often used as fundraising strategy in the non-profit sector. Corporate giving to nonprofits allows corporations to fulfill their social responsibilities by giving back to employees, patrons, and their communities. Although many corporations have charitable foundations, corporate contributions are often made through marketing departments. The Internal Revenue Service does not consider a “sponsorship,” with its advertisement component a charitable contribution.
- **Endowment Gifts** are funds that have been contributed to an organization with the specific purpose of being invested in order to generate income over a period of time. While some endowment campaigns are focused on generating a large quantity of contributions, many involve the cultivation of major gifts, bequests, or charitable grants.
- **Special Event Fundraising** is typically defined as the creation of “special” occasions to promote an idea, cause, or a program. The purpose generally includes making a profit; however, special events also offer an opportunity to improve relationships between the organization, its stakeholders, and the community at large. In many cases a special event is a “threshold” activity used to introduce a potential stakeholder to an organization. At the very least, special

events should increase public awareness of an organization and subsequently make fundraising on other levels more successful.

The over-arching strategy of fundraising is to motivate donors to continue to support the institution at increasingly higher levels over time and raise their level of commitment and investment (Wendroff 34). Within the overall strategy, individual development activities may be focused on specific goals. These goals may include the following:

- Fundraising directed at bringing in new donors (acquisition)
- Fundraising focused on current donors giving regularly (retention)
- Fundraising objective to get current donors to give larger amounts of money (promotion)

Nonetheless, there are details to be considered in what methods are most likely to result in desired goals. Calculating the cost-per-income ratio of different fundraising strategies is essential, Weinstein outlines what he feels is a reasonable return on investment for a number of development strategies (39).

Table 3.1 Cost Effectiveness of Various Fundraising Strategies

<u>Fund-Raising</u>	<u>Typical Expense Range</u>
• Direct Mail Acquisition	• \$0.95 to \$1.50 per \$ raised
• Direct Mail Renewal	• \$0.35 to \$0.42 per \$ raised
• Special Event	• \$0.45 to \$0.55 per \$ of gross proceeds
• Grants: Corporation and Foundation	• \$0.03 to \$0.20 per \$ raised
• Planning Giving	• \$0.05 to \$0.25 per \$ raised
• Major Gifts	• \$0.05 to \$0.15 per \$ raised

While special event planning may appear to be a different process than other elements of fundraising, a look at the techniques of reaching and persuading people to participate in such an event, reveals it must make use of the same tools. According to Stanley Weinstein, the author of *The Complete Guide to Fundraising Management*, the process of deciding the best strategies for a specified event will include questions such as: What resources will be required of staff and volunteers to create a successful event? What will it cost to create an event that will reach established goals? Does the organization have a profile and level of support within the community to encourage success (130)? The following chapter will focus specifically on the issues and challenges inherent in successful event planning.

CHAPTER IV

SPECIAL EVENT PLANNING PREPARTION

According to Edwin Liebert, author of *Handbook of Special Events for Nonprofit Organizations*, “a special event should be related to some important occasion or purpose, for some “special reason”. In the context of special events created by non-profit organizations, that purpose is usually to raise money, to raise the profile of the organization, and to initiate or solidify relationships with stakeholders. (19) One of the most important advantages to special events is that they involve face-to-face encounters which provide opportunities to relate the mission of the organization to an audience of interested or potentially interested donors. At the very outset of planning a special event, it is essential to determine the relative importance of each of the possible goals.

On this subject, David Nelson, author of *Getting the Payoff from Special Events*, distinguishes between two key categories of events those that raise significant amounts of money (type “A”), and those that raise public awareness (type “B”). (1) Although the ultimate goal of both of these types of events is to develop a dependable income stream, there are significant differences between the natures of these two types of events. Nelson identifies the general characteristics of type “A” events as follows:

- High level of loyalty to the organization by those attending
- High individual cost to participate.

- Attendance limited to those who can afford to make substantial charitable contributions and who have peer of similar financial means.
- A pre-identified target cohort group of potential attenders making marketing of these even more focus on specific and peer to peer invitations, reducing the cost of event marketing required for board-based “public” events.

The identification of potential major donors who may be having their first experience with the organization through a social event.

Nelson identifies type “B” events as those having the goal of raising visibility and establishing public perception, often referred to as “branding” the organization. Type “B” event characteristics include such things as:

- Less loyalty to the organization by those attending
- Low individual cost to participate
- Large attendance/ higher visibility
- Higher administrative and advertising investment
- Few conversions of attenders into significant donors

It is essential that the ultimate goals of special events be determined and agreed upon in order to make sure that appropriate strategies are developed to reach those goals. Failure to make this important decision will make it impossible to evaluate the success of the event at best, and can lead to a financial or branding disaster at worst. Equally important to the consideration of planning a special event is to evaluate the public perception of the organization, and the resources that can be devoted to such an endeavor. Public perception, referred to in marketing as the organizational “brand,” is a reflection of the public awareness of the mission of the organization, its institutional structure, its

history of successes (or failures), and whether the perceiver relates positively, negatively, or at all, to its mission. In the non-profit arts, these elements are particularly important as this field is in competition with health services, social services, and a myriad of other good cause that may be perceived as fundamentally more “essential” than the arts.

At a very basic level, any organization considering mounting a special event must have a clearly stated mission; a real estimation of the organization’s perception in the community. A strategy for developing a strong and unique brand, if it has not already, an event itself, may be part of that strategy; and a realistic evaluation of staff capability to be involved in special events without jeopardizing an organization’s fundamental programming. Most important of all is that the board of directors and its carefully selected and prepared volunteers are sufficiently committed and capable to engage in planning, executing, and marketing an event. Choosing the right people is vital to ensuring that the event’s committee is a genuine asset, adding value to the event’s organizing process. Proceeding without a clear evaluation of resources is risky at best, and disastrous at worst.

As part of the planning process of a special event, a decision must be made to determine the target audience. The target audience is evaluated and measured by what is suitable for the organization. It is also important to know if any other community activities will be competing with your event for your target audience. Having clearly defined your goals and evaluated your potential audience and your ability to reach them; the next step, according to Stallings & McMillions authors of *How To Produce Fabulous Fundraising Events*, is to select an event type that appears to fit the event. Generally the events will fall under one of several categories listed below: (37-40)

- **Food and Drink Events:** feature a meal or have special food served. These can range from tea parties to wine tastings; from informal events featuring ethnic foods, to restaurant openings to grand dinners. To broaden the draw to these kinds of events, they may be combined with events that honor people for achievement, or “roast” people who have a high profile in the community, or they might include an element such as a fashion show. To enhance the fundraising element of this kind of event, activities such as auctions or raffling donated items might be added to the evening. The greater the potential for raising money, the more careful preparation has to be made, and the longer it will take to plan the event. The expense to sponsor these events also is closely tied to the tedious but critical task of getting as much of the cost of the venue, food, beverages, and other expenses underwritten by vendors or sponsors. Many of these types of fundraisers become signature events for an organization and are held annually, with potentially great financial returns.
- **Holiday and Special Occasion Events:** are held to celebrate the season and to raise funds for the organization. These events require careful preparation because volunteer time is often restricted around holidays, and social calendars tend to be more fully booked at these times of the year. Therefore, preparations for the event should always be scheduled as far in advance as possible. These events may range from doing a day of gift-wrapping for donations, to something as large as organizations sponsoring a community Fourth of July Fireworks.
- **Merchandise Events:** feature the sale of products or services. Examples are antique shows, flea markets, rare book, and arts and crafts fairs. Organizations

that try to raise the most money on these types of special events are often those that can depend on a very large number of volunteers to coordinate a large event that charges a fee for vendor participation, as well as an entry fee for visitors.

- **Entertainment Events:** have a high level of risk but can also produce the highest returns on investment. Success is affected by the cost or donation of the "brand name" entertainment, how many tickets must be sold to break even, how much money is needed up front, and whether there are back-out clauses with facilities. Weather can also be an issue if the entertainment is to be out of doors.
- **Athletic Events:** such as marathons and 10K runs are becoming progressively more popular. However, there is now greater competition for participants because of the increased number of so many excellent events. To set up a local athletic event takes a considerable contacts and permits. These high liability events should only be considered if you have access to the professional talent and management. The profit from this type of event often comes from pledges of money made to the participants to support whatever the cause is. The collection of pledges presents a unique challenge in this kind of event.

The list, although not comprehensive, suggests a wide range of events that might be considered. Most importantly, it suggests that events planned to raise large amounts of money are inherently more complex and often present risks.

Considering the numerous options, the following questions are important to ask in order to select an appropriate event:

- What is the financial need?
- What are the available resources of time and manpower?

- What is the target audience?
- What should this event *say* about the organization?

This last question has to do with building perception in the community. What should people who attend feel after the event? Do we want them to understand our mission better? Do we want them to see our venue? Do we want them to see examples of the quality of our work? Do we want them to meet the people we serve? Do we want them to spend time with other people who support our work? The answers to these kinds of questions should have an impact on every aspect of planning. This preparation process will ensure that the every element will have supported not just the financial goal, but also will have contributed to building a stronger emotional connection with the people who have supported the cause. The time invested in the event planning preparation will assure that what is imagined can ultimately be executed. Event planning is a creative and a challenging undertaking whether staging an event for thousands or for a handful of guests. The goal is similar for all event planning produces a significant and memorable event that meets and exceeds the event's objective and eliminates as many unexpected expenses and precludes as many unexpected expenses and surprise as possible. It is essential for all organizations to understand that proposing the "right event" requires considerable time and careful thought. If the vision, purpose and goals for an event are not clear from the start, it will be virtually impossible to agree on cost-effective and coordinated methods to achieve a successful event.

CHAPTER V

PLANNING, BUDGETING, AND MARKETING

In his book, *The Complete Guide to Fundraising Management*, Stanley Weinstein identifies four steps in creating an effective and ultimately successful event. They are the following: goal setting, planning, organizing and administrative.

In the Weinstein formula, goal setting provides the road map for the planning process. Goals as defined in previous chapters are *specific, measurable, achievable, realistic and time-targeted* (S.M.A.R.T). The SMART strategy ensures that participants in coordinating a successful event are able to identify common goals and therefore, are able to devise clear and effective strategies to reach desired outcomes.

For example, on the issue of specific goals, it is not enough to say that an organization needs to raise money. All non-profit organizations need to raise money. But, determining to raise a specific amount of money will lead to discussions of whether the goal is actually realistically achievable considering the resources available. A specific goal will also open a discussion about how long it will take to achieve the goal. If money cannot be raised by the time it is needed, auxiliary plans will be needed.

Often the only measurable goal for an event is profit how much revenue will this event generate over the cost of producing it? It is essential to remember that a special event can achieve secondary goals that may also be of benefit. Special events are

ultimately successful when they generate both financial goals (primary, quantitatively measurable, and short-term) and non-financial (secondary, substantive, and long-term) goals. Thinking strategically regarding an event, relative to short and long-term goals, will determine if the event is repeatable (Bray, 271).

Once the planning process is completed, the next task is to determine strategies or action steps that will incorporate goals with resources (financial, human) and time. Human capital is a major resource for non-profits. No organization, or in this case event, can succeed beyond the capabilities of its human resources. Professional and volunteer personnel affect every element of the planning, organization, and production of a special event.

Finding the right person to chair the event committee is essential. This person will need to create an effective working group by identifying and recruiting people who have the capability of performing one of the many tasks at hand, and who have the ability to work together as a team. Ideally, the team must be diverse and include members of the target population or others affected by the program. These people will have an allegiance to the organization as well as to the creation of a social event. The event coordinator is responsible for the formation of committees, the delegation of responsibilities, and the monitoring of progress. This person must have the ability to multitask, manage people, anticipate challenges, and recognize potential problems. Most importantly, this person must possess the ability to motivate and appreciate the work of committee members while maintaining standards for the quality of the work in every area.

Shannon Kilkenny, author of *The Complete Guide to Successful Event Planning*, provides a brief checklist listing examples of the responsibilities that may befall an event chair: (56)

Table 5.1 Example of Event Chair Responsibilities

- | | |
|---|--|
| • Setting meeting agendas | • Developing goals and theme |
| • Proofing advertising, marketing, and press releases | • Creating a comprehensive event time line |
| • Setting and monitoring the budget | • Appointing sub-committee chairs |
| • Coordinating and supporting the flow of information between committees. | • Communicate roles and responsibilities to sub-committees |
| • Evaluating the event plan | • Tracking progress |
| • Thanking all of the participants and special guest | • Being available to provide guidance |

Members of an event committee must be chosen not only for their willingness to serve, but also by the skills they possess. They must have the authority necessary to fulfill the duties and responsibilities they have been assigned. They must also be held accountable for the successful completion of the tasks they accept. Committee structures are like the root structures of trees. Each root contributes vital support, but if that root fails, others will have to make up the difference or the whole tree is put in jeopardy.

According to Kilkenny assigning roles and responsibilities is established early in the planning process. Kilkenny goes on to state that, whether the organization is large or small, breaking up the duties into teams can be extremely helpful. To achieve the best

results, the core committee /team should have least five but not more the ten people depending on the size of the organization. Shannon suggests the following for assigning roles and responsibilities by committee group: (57)

- **Operation Committee:** this team handles overall responsibilities of the operation of the event, including management of all logistically aspect of the team members. The roles and responsibilities for this will vary depending on the variable of the event.
- **Financial Committee:** this team ultimately creates the budget and financial timelines and designs the accounting structure. It also should be involved in securing underwriting and sponsorships to provide income in addition to ticket sales.
- **Marketing and Communication Committee:** this team knows the audience, promotions techniques, how to reach participants, how to design, implement the process, and understands the latest technological strategies. The public relations members will greet and assist in the event's fundraising activities, and assist at a silent auction or any other revenue generating station at the event.
- **Legal committee:** this committee should be aware of issues related to contracts, insurance, taxes, licenses

No matter the size of the event or the number of tasks assigned to each committee member, everyone on every committee must have some financial commitment to the success of the event. It cannot be emphasized enough that choosing the right people for each committee category is vital to ensuring the event success which includes their ability and willingness to contribute financially. It is worth considering and identifying other

individuals in similar organizations that may have a willingness to get involved or collaborate which will strengthen future events (Kilkenny 55- 57). The delegation of tasks and responsibilities of each committee is crucial. Identifying clear lines of accountability, reporting relationships, and deadlines are key to the organizational process of the committees.

The financial committee should be responsible for creating a budget for the event by examining ways to underwrite costs and generate additional revenue. In developing a realistic event budget, income and expenses are identified, addressed, and accounted. The most effective way to achieve this is to carefully examine every element of the event, and compile a budget worksheet, based upon preliminary budget figures. A project budget that clearly specifies how the funds are spent and includes a realistic projection of a variety income sources or money allocated from the organization's operational budget along with funds that come from corporate partnerships, etc. increases the possibilities for organizations to receive contribution income. This budget also sets the goals for other committees as well.

The budget expense column should include absolutely everything; facility rental, food, graphic design, printing, consultants, postage, talent, decorations, insurance, security, fees, and lodging. Identification of costs is a critical element for any event's success and a key part of the process for the committee to assess accurately and correctly. Carter suggest, when reviewing budget expenses, finances should be broken down into two categories: (29-30)

- **Fixed costs:** are costs that typically do not change (in total) in response to changes in volume of activity. For example the location (non-donated) is fixed

regardless of the number of people in attendance at the event. Marketing, some publicity and printing and examples of other costs that might be incurred if the event is cancelled.

- **Variable costs:** are more difficult to project. For example, the cost determined by the number of attendees is a variable cost. The most likely cost variable in this category is food.

Carter goes on to state that usually, depending on the size of the organization, the cost will be broken down into the two categories listed above. It is however, also necessary to consider two associated categories: (30)

- **Indirect costs:** typically consisting of staff time and the use of other departments such as press and accounting.
- **Hidden costs:** can make or break an otherwise financially successful event. Fees, licenses, security items may surprise novice event planners. Carter continues by stating that specific review sessions must occur at crucial stages throughout the process of creating an event to ensure updates and status changes are met. A budget is a plan, but it is not cast in stone. Budgets must be adjusted to reflect unforeseeable variables and other compromising factors as they become evident

Ilona Bray, author of *Effective Fundraising for NonProfits*, suggest that the comprehensive way to understand the event budgeting process is to list the expected expense and the estimated income in a spreadsheet format. The categories for these expense and income are listed in Table 5.2 and 5.3 respectively (273-275).

Table 5.2 Projected Expenses and Opportunities to Secure In-kind Contributions

- Venue
- Advertising and Marketing
- Performers, artists and celebrities
- Transportation
- Personnel
- Invitations
- Travel
- Traffic/Parking
- Catering and drinks
- Insurance
- Photographer
- Postage
- Decorations
- Physical equipment
- License Fees
- Miscellaneous/ Unexpected or Emergency

Bray also suggests adding 20% to the total for unanticipated costs or occurrences to more accurately calculate an estimated expenses total. Correctly anticipating income is more challenging and definitely more difficult if the event is being produced for the first time. If the event becomes a tradition or signature event, there is a better chance of creating and accurately assessing potential earnings from year to year. However, if this is the first event produced for the organization, Bray suggests soliciting as many donations as possible. The more donations received better the potential earnings.

Table 5.3 Projected Special Event Income

- Tickets Sales
- Rental Fees/ Vendor per booth
- Sales of food or goods
- Advertisement: Ad books or ad space in a program
- Corporate Sponsorships
- Silent auction or raffle proceeds

Finally, after subtracting projected expense from anticipated income, whatever remains, no matter how small, is earned income from the event. For a successful event your income must exceed your expenses by a reasonable margin. After the budget process is complete and all potential income and expenses are identified, the financial committee will need to create a checklist to assist in the ongoing updates needed to monitor changes against the event goal.

The marketing/public relations committee goals are entirely related to raising money and educating the community about the value of supporting the mission of a specific nonprofit organization. From a big-picture public relations point of view, this task may involve illuminating the past successes of the organization in meeting its goals, identifying and establishing the credentials of its leadership, in short, building on the “brand” of the organization. Personal solicitation may include giving speeches, meeting with legislators, writing articles, and hosting workshops. The committee will conduct public relations for the event and showcase, in a controlled presentation, the most favorable aspects of the organization (Wendroff 113).

In order to make sure that public relations are being well managed, one must determine target audience and the best way to reach it. The Internet has become one of

the most popular sources people use to gather information. Public relations is a broad area for any committee. Public relations entails; media relations, PR writing, external and relationships with other organizations.

This committee may be responsible for writing of press releases a skill still required for effective publication on the Internet. Twenty-first century social media adds personal contacts and the exploration of new ideas in attracting attention to an organization. Building relationships is the most effective way to secure media coverage and it is certainly the best way to secure in-kind media donations.

Marketing a special event has a much more specific focus and is time-specific. The goal is to raise public awareness of an appealing opportunity to support a worthwhile organization and communicate the individual will have felt personally rewarded doing so. The challenge is to get potential patrons to make the decision to act on the opportunity. According to Ron Urbanczyk, author of *The Fundraising Guide for Chairpersons*, marketing is the key to the successful special event. The audience targeted will dictate the advertising method. Strategically selecting the right methods to connect to your target audience may be restricting the budget, but more important is to find the message that reflects the organization and presents the event itself and something one would want to attend (58-59).

Pauline Carter, author of *The Complete Special Events Handbook*, suggests combining several methods for promoting and marketing the event. Carter states that this approach can be more effective than utilizing all resources on one category. A combination will allow for optimum dissemination of the organization's message and one

technique builds upon another. Marketing categories recognized as effective in reaching target audiences are: (110-113)

- **Personal solicitation:** Face-to-face, particularly peer-to-peer connections with the target, is the most effective element of marketing. A clear core message is the guiding force for all events, slogans, marketing and resources.
- **Social media:** With the development of the Internet and social media, organizations are finding inexpensive and effective new ways to reach out. Use of social media sites like LinkedIn, Facebook, and Twitter are necessary to keep up with the competition. Social media efficiently promotes discussion about events with a broad demographic of website users. The ability to post photos and videos is becoming more popular and are great tools for evoking intellectual and emotional interest in particular events and their sponsors.
- **TV/Radio:** Sound is an influential feature for radio because there are no distractions from the audience. Public service announcements provide information about an issue, an event, a performance, in a consistent format. Both radio and television stations commit a percentage of air time for free public service spots on behalf of nonprofit organizations. Magazines are often expensive and require extended lead-times. Life-style magazines focus on specific communities and are useful in promoting special events, particularly if there is an opportunity to have a feature article as opposed to, or in addition to paid advertising. Another option for this type of publication is the increased use of posting photographic images of events and participants in after-event photo galleries.

- **Direct Mail:** This traditional form of mass communication is frequently used as a marketing tool by small to medium sized companies and is often more cost-effective than TV and newspaper advertising. Direct mail can be sent directly to the potential target audience.
- **Venue:** Some venues have their own PR programmer; it is always worth checking to see if there is an additional cost to have the event listed.

These marketing strategies can also assist in building the event infrastructure by bringing in volunteer groups, corporate sponsorship, and high profile patronage (Carter107). Depending on the type of event and/ or the budget the committee may also consider hiring a professional photographer to chronicle the event, providing opportunities for increased coverage before and after the event.

The final sub-committee, identified by Stallings and McMillion, is the legal committee. The members of this committee address concerns such as:

- Contracts with all vendors, venues, caterers, performers, etc. Issues include such things as contract cancellation dates, and unsatisfactory service.
- Alcohol/ liability: obtaining the appropriate licenses. Arrangements with venues that have liquor licenses, etc.
- Ada compliance: physical accessibility i.e. wheelchair
- Fees and licenses: all events held in large municipal areas are required to pay whatever fees and licenses are required by the governing entity.

The foundation of this thesis's research, thus far, has focused on the three elements of analyzing a financially successful special fundraising event. Components discussed included: examining and identify specific fundraising strategies, type of events,

and organizational structures. A fourth element of building the capacity to make special events an integral part of a well-rounded fundraising program is post-event evaluation.

The meaningful assessment of an event should consist of a simple calculation of profit in relation to the goal, an analysis of the profit-to-cost ratio, a head count of attendees, and a detailed discussion among committee leaders determining what elements worked and what elements did not. Perhaps most importantly, the successful outcome of event must be evaluated for the degree of effective use of resources and how those resources balanced against earnings. If the assessment finds that the event was not right for the goal, a discussion should be initiated resulting in recommendations to apply to better planning of future events. The purpose of this process should not be so much negatively evaluative (who succeeded, who dropped that ball, although it is hard to avoid that) as it should be a positive, productive and formative process, resulting not in blame, but in recommendations for genuine improvements.

According to Stallings and McMillion, a thorough evaluation of an event should be gathered from all possible sources, including but limited to the following:

- Staff/Volunteers
- Vendors
- Donors/underwriters/sponsors
- Attendees of the event

Stalling and McMillion go on to state it is helpful to have a brief questionnaire distributed in the program or at receptions table. This questionnaire also serves as a great tool for follow-up and obtaining critical information such as email address, future event interest, and current afflictions. The methods of gathering information can vary from

formal questionnaire to an informal focus group. One informal aspect of gathering information is gaining feedback from the major supporters. This gives major supports an opportunity to share their thoughts on the event and how they felt about their participation in the event.

A critical part of assessment is follow-up and should not be just the portion of the event where thank you cards are given. Every non-profit organization recognizes that one can never say thank you enough. It is a very critical step in the process and should not be overlooked. Assign a committee to follow-up on details of the post-event process. One of the most often heard complaints from contributors to charitable fundraising events is, “They never even said thank-you.” The same is also true for event volunteers.

CHAPTER VI

CASE STUDIES

In nonprofit events, where the organization's central focus is that of public service, it is more challenging to define purposes of events and can be a perplexing task to try to find the proper benchmarks by which to measure an event's success. The organizational analysis of a special event is therefore related to the purpose and mission of the organization. To examine the process of an organizational analysis for the project, this research applied theoretical constructs to real world examples to determine how financially successful special events were conducted. Data used for the analysis was collected via interviews with development executives or fundraisers of eight diverse art organizations. The interviewed positions included senior managers, development directors, and board members. For purposes of this paper, definitions for organizational sizes are determined by the following annual budgets: small (less than one million dollars), medium (1million to 50 million dollars), and large is (greater than 50 million dollars). All organizations reported that they have a 501 (c)(3) status, and are located in Northeastern Ohio. The analysis summarizes outcomes and identifies common threads of best practices. For the purpose of this conversation "best practices" refer to concepts described by Dr. Joe Goldblatt, CSEP, in his book *Special Events: the Roots and Wings*

of Celebration. Goldblatt identifies the following five key qualities found in successful nonprofit organizations: (393)

- Organizations that continually, over time, advance their mission through consistent performance improvement.
- Organizations that continually innovate to improve and enlarge their body of knowledge.
- Organizations that create new opportunities for the expansion of the profession.
- Organizations that seek to promote positive global impacts through their individual contributions.
- Organizations promote sustainability through each event.

The organizations that participated in the interview/surveys are listed below alphabetically:

- **Cleveland Museum of Art:** was founded in 1913 “for the benefit of all the people forever.” Mission: “We strive to help the broadest possible audience understand and engage with the world’s great art while honoring the highest aesthetic, intellectual, and professional standards. The museum opened on June 6, 1916 after many years of planning (quoted in CMA).
- **Fine Art Council of Trumbull County (FACT):** was established in 1971 when six community organizations recognized the need for mutual support and coordination of the arts and cultural organizations. Our mission is "to improve the quality of life in Trumbull County, by fostering the arts (qtd in FACT).

- **Ideastream:** was founded July 1, 2001 as a non-profit organization, Ideastream, began as a new public station combining WVIZ/PBS and 90.3 WCPN. The concept of Ideastream is “to bring together a variety of educational and public service media programs to leverage creative, technical and financial assets to better serve our communities (qtd in Ideastream).
- **Kent State University, College of Arts, public cultural services including KSU Fashion Museum, and Porthouse Theatre:** is a partnership created at the inception of Blossom Music Center in 1968. The Musical Arts Association has partnered with Kent State University and its College of the Arts “to develop Blossom as a complete environment for the arts (qtd in Porthouse).
- **Maltz Museum of Jewish Heritage:** was founded in collaboration between The Maltz Family Foundation, the Jewish Federation of Cleveland’s Centennial Initiative, and The Temple-Tifereth Israel with research support from the Western Reserve Historical Society. The Maltz opened in 2005 and devoted to diversity and tolerance, with a simple mission: to build bridges of tolerance and understanding by sharing Jewish heritage through the lens of the American experience (qtd in Maltz).
- **The Textiles Art Alliance (TAA):** is “an affiliate group of the Cleveland Museum of Art. TAA is an active organization of artists, designers, craftspeople, educators, and collectors with a common interest in textile and fiber arts. Formed in 1934, TAA’s purpose is to promote the fiber arts through exhibitions,

educational programs and purchases for the enlargement of the textile collection of the Cleveland Museum of Art (qtd in TAA).

- **Ukrainian Archival Museum:** was founded in Cleveland in 1952 by displaced scholars who took on the mission of “collecting and preserving items from Ukrainian history and culture during an era when this kind of material was being deliberately destroyed in Soviet Ukraine (qtd in UMA).
- **Youth Excellence Performing Arts Workshop (YEPEW):** was created by Leslie Barnes with the help of local politicians, educators, medical professionals, and business leaders in response to a comment made in 1990 regarding our youth as a "lost generation.” The mission is “to encourage youth through the arts to pursue lifestyles of excellence (qtd in YEPAW).

A preparation strategy begins with understanding the importance of the institution’s mission, which is critical to the success of a special event. According to David Wragg, the author of *Practical Fundraising for Individuals and Small Groups*, it is easier to obtain support if you can already demonstrate that your cause (mission) is successful (99). According to experts in the field of small organizations, a new special event may have a problem of proving the value of the cause it serves because there is no track record of success.

Small organizations have one advantage over large organizations. That advantage is that smaller organizations generally have less bureaucratic structure within the institution in comparison to large organizations. Larger organizations often have a number of departments organized in a cumbersome hierarchical management structure, which can make it more difficult to get approval within a few levels or steps.

Leslie Barnes, Executive Director of Youth Excellence Performing Arts Workshop (YEPAW), says that YEPAW changed their program event fundraising strategy in 2012, implementing an innovative idea to improve event-generated income for the organization. The special event changed from presenting a professional performance to producing its own production using the students who benefit from their programs. Not only did this decision reduce overhead expenses, it also shifted external expenses into an investment in its own programs, and showcased to donors and potential donors the value and quality of YEPAW's programs. As a small local arts organization, this fundamental and somewhat risky change was a relatively easy decision to implement. This type of venture in a larger organization would have taken significantly more time to accomplish.

In 2012, the fundraising event featured an in-house production of *The Wiz*. In preparation for the production, YEPAW youth participants went through extensive training in every aspect of theatre production. Barnes' decision resulted in raising money, reduction of overhead costs, and investment in the stability of the organization, and created new opportunities to increase the awareness of the organization's mission. Thoughtful planning, and looking at long, as well as short-term goals, resulted in success on several levels.

Special events sometimes attract attention beyond the organization creating them. For example, honoring a high profile person may generate financial support from donors and sponsors who might not normally attend. The Ukrainian Archival Museum is a specific example of a celebrity-generated gift. Andrew Fedynsky, Director Emeritus and Resident Scholar for the Ukrainian Archival Museum, received a surprise gift during the Ukrainian Archival Museum's 50th Anniversary celebration. The surprise donation,

made in his honor, was received from a group of congresswomen and other government officials totaling \$200,000. The money was designated for support of the organization's mission. The organization can leverage that gift to get other gifts from supporters. UKA is considered to be a small organization. However, its stability and reputation over the years afforded them an extensive mailing list to assess potential fundraiser and sponsorships. The UKA continues to promote sustainability through each special event produced over the years.

An affiliation that has been working for many years with great success is the joint effort of the Porthouse Theater and the Kent State University theater program. According to Effie Tsengas, Manager and PR/Marketing Coordinator, "Adopt a Student Program" is a financially successful event, as well as a priceless contribution to student education. As a direct result of the excellence and popularity of this event, thousands of dollars has been raised every year to assist in deferring a portion of the educational expenses for performing art students while providing a community service.

Another example of a successful partnership is Ideastream. The concept of Public Radio and Public Television was created in Cleveland, Ohio. Sharon Herene, major gifts director for Ideastream, stated that their annual special event, called IdeaLeaders, continues to be a success. The event recognizes each donor contributing \$1000 or more. The IdeaLeaders is recognized for making a substantial contribution to maintaining the organizations' excellence and meeting its mission. In addition, this organization has all the marketing components of social media inherent in its mission, making access to potential donors efficient and relatively inexpensive.

Another example of a long-established affiliation is pairing of the Textile Art Alliance (TAA) and the Cleveland Museum of Art (CMA). The Textiles Art Alliance produces a special event every year. TAA produces a fashion show, which generates between \$20,000 and \$50,000 dollars a year for the Cleveland Museum of Art. One of the many advantages afforded the TAA through its relationship to CMA, a large institution by international standards. This relationship provides TAA access to some of the resources of a larger established organization. TAA is able to market to a broader audience and generate potentially larger donations than smaller organizations producing a similar event. The TAA staff has been able to increase revenue every year by analyzing need changes, implementing changes and introducing new artists all contributing to increasingly successful events every year.

The Cleveland Art Museum has many special events each year. One is the Solstice Event. This musical event has several components. The event starts early in the afternoon with tickets sold to VIP donors and sponsors for a private showing and catered food. General admission tickets are sold to the public for music, food, and dance. One of the aspects contributing to the event's success is the ability to market to several age groups within one event. Another contributing factor to the event's success is that it is held on the CMA property. The location of a special event is important, since it also helps to determine the nature and style of the presentation. A similar event in a smaller organization would not have similar results. The ability to produce the event on site reduces overhead costs. Additionally, CMA has several on-going relationships with partners that donate time and resources to further reduce the cost of the event.

The Maltz Museum of Jewish Heritage has several special events each year as well. One of the events is The Maltz Heritage Award Dinner. Judi Feniger, Executive Director of the Maltz, stated they have produced several events since their opening in 2005, however; “The Stop the Hate” event is one of their more successful annual events. This event supports their mission to build bridges of appreciation, tolerance and understanding of persons of all religions, races, cultures and ethnic backgrounds. This event also promotes positive impact through individual’s involvement. Another noteworthy event was their fifth-year anniversary, gala-style dinner. This event was an opportunity to recognize the organization, the supporting community and the institution’s impact on the community over the five years since opening. The Celebration of Cultures in Cleveland is an additional event that is held every year. The Maltz museum is a mid-size museum enjoying generous donation, sponsorship and community support since the early stages of the museum’s formulation of a mission and its institutional conception.

Last, but not least, is the Fine Art Council of Trumbull County (FACT). FACT is a small organization, but it has a growing presence in the community. FACT receives funding through corporate, foundation, and individual donations. FACT has a noteworthy special event every year called the Ghost Walk. This special event sold tickets to over 1500 participants in 2012. One of the contributing factors to this event’s success is its family orientation. This is not an exclusive or high-ticket event. While it generates some income, it is conceived of as a day of fun and is directly aligned to the organization’s mission to improve the quality of life in Trumbull Country by fostering the arts. The event meets its financial goals every year; but even more importantly, the event develops friends as well as funds.

In every special event, financial goals vary based on their size and the event type that the organization is undertaking. Therefore, the overall success of the special event also differs. It is essential to identify the financial resources available to sustain development and execution of an event. According to Wragg, there is a good rule of thumb that states 10-15% should be spent on fundraising and administrative expenses. If the event is not attaining the 50% of the goal after the third year, the institution should consider altering the fundraising event. Wragg created helpful hints, intended to help an institution capitalize on financial goals (167). The checklist is as follows:

- Be clear about what can be done by your own team, whether voluntary or paid and identify the areas where help is needed.
- Attempt to identify experienced people who may be able to volunteer sometime to assist you or, hiring a consultant.
- See whether there are any organizations able to handle work on a voluntary basis as an in-kind donation.

Although I limited this case study to these eight organizations, the process started with considerably more nonprofit art organizations employing fundraising events in Northeastern Ohio. I did not want to use budget size as indicator of success, because that would be measuring a contribution quantitatively (by dollar amount raised, purely measured in funding), rather than measuring production and qualitative results (community awareness, incremental program progress, successful use of limited resources) for each individual organization event. The pressing question, which ultimately directed me to these organizations, was what makes a successful fundraising event? Each of the organizations interviewed are fine examples of demonstrated best

practice. This assessment is obtained by measuring the individual success of each institution in utilizing both monetary (fundraising) and non-monetary (friend-raising) goals, as well as implementing in-kind gifts to successfully create successful events. Each of the organizations selected continues to produce significant and sustained results within their organization's events. Collectively the organizations selected have influenced other organizations directly or indirectly, inspiring them to adapt these exemplary concepts and best practices within their own special event planning.

CHAPTER VII

CONCLUSION

There are many valuable research resources pertaining to how to conduct or evaluate a successful fundraising event and a number of them have been cited in this research. David Wragg, author of *Practical Fundraising for Individuals and Small Groups*, makes the comparison of fundraising to a business transaction. In this respect, the fundraising event is the transaction and the organization is the business. Wragg goes on to suggest that raising money, or obtaining support, is like selling a product, the art of persuasion is essential. Just as a good salesperson bears in mind what the client wants, so the fundraiser must also be conscious of just what the nonprofit community wants, as well as needs. Then the fundraiser may proceed to “sell” the mission of the organization. Effective fundraisers do not hesitate in asking for money to further the cause or the mission (82).

Special events are notorious for their intense demands on staff and volunteer time, and there is extraordinary competition for both time and money. Nevertheless, strategic planning and careful execution can make the cost/benefit ratio worthwhile for the organization. As stated above, every goal should be “SMART” (specific, measurable, achievable, realistic and time bound).

The proper planning and identifications of goals are essential to the success of any fundraising event. Often the only *evaluative* criterion for an event is, “How much did it make?” Thinking strategically regarding an event, both short-term (income, and did everyone have a good time?), and long-term (how did the event reflect the mission and brand of the organization?), will make a difference in the lasting quality of the event and the sustainability of the organization.

The research provides basic resources that assist in the creation of a variety of special events. Poor event planning can result in a special event losing money, failing to entice new sponsors, public relations problems, and loss of morale among stakeholders. Unaware of what to ask or what red-flags to look out for can have serious and costly repercussions. To maximize results and meet or exceed event expectations, fundraising event chairs, their committee members and the dedicated volunteers need to invest their time in planning and training to have successful special events organization and execution (Allen 243-245). Ensuring there is a *realistic* strategy for raising money is a key responsibility of event chair. This includes approving and monitoring the fundraising plan to ensure sustainability; requiring all committee members to do something to implement the plan. Being very clear about the expectations of committee members during the recruitment process is essential.

In addition to human capital, the research suggests that the business and administrative components of event planning is also paramount to event success, which requires sales, marketing, strategic planning, negotiations, budget controls, and technique. As mentioned in Chapter 6, evaluation and assessments continue as the event

progresses. This step helps determine if it is necessary to reevaluate and/or change the event planning process and timeframe.

This researcher has, through exploration of the research and interviews, provided an understanding of the detailed stages of special fundraising events, which assists in accessing special event outcomes. Although there are no existing statistics regarding the exact contribution of special events to overall fundraising in America, it is obvious that there is a wide professional group of fundraisers constantly re-inventing fundraising strategies; and events continue to be a very powerful and essential tool contributing to the health and existence of all organizations in the nonprofit field.

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