

**STRATEGIC SPECIAL EVENTS**  
**Important Considerations and Lessons Learned**

**Donors Forum of Chicago**  
**on January 28, 2004**

**A. Summary of Ann Becker's Introductory Comments about Current Realities and Strategic Considerations**

Today's nonprofits, more than ever, require creative ways to leverage stretched or shrinking financial and human resources. Special events are an important resource, if they are managed properly.

We begin with the following realities:

1. The marketplace is flooded with events of all kinds.
2. The competing demands on donors, sponsors, and vendors are huge.
3. Too many events try to be all things to all people and fail.
4. Special events are often the costliest, most time consuming, and highest risk kind of fundraising.
5. There is a huge turnover in the events industry: people responsible for events are often not well paid, asked to do just about everything, and frequently burn out.

Given these realities, it is more important than ever to think through a set of strategic considerations before jumping into the specific "nuts and bolts" of event planning such as picking a theme, managing the logistics, deciding on the invitations, etc. Major strategic questions that must be asked when deciding whether to hold a special event include how to:

1. Determine when to use a special event to achieve fundraising objectives.
2. Identify major risks associated with special events.
3. Figure out how to maximize the return on investment from special events.
4. Explore effective ways to engage current and new donors, sponsors, and vendors.
5. Identify necessary systems and steps for event fundraising to be successful, including following up after the event.
6. Identify strategies to minimize staff and volunteer burnout and engage volunteers for further service.

**B. Summary of the "Major Lessons Learned" during the Session**

1. Identify the people you want in the room as your guests before you decide what kind of event you will be holding.
2. Make a clear distinction between the purpose of your special event and your organization's mission. The two must be compatible, but they are not the same.
3. Spend most of your time on revenue generation and no more time than necessary on committee management.
4. If your timetable continuously slips behind, investigate why. It often means you are dealing with multiple, competing objectives and inaccessible, uninvolved decision-makers.
5. To assess the real risk of mounting a special event, consider the opportunity costs. If you devote several months of effort to your event, know that you are foregoing the opportunity to do something else. Consider carefully whether the resources you invest in the event will generate a higher return on investment than those you could have devoted to alternative activities.