

Special Events—The Fun in Fundraising

CHAPTER OUTLINE

- The Fun in Fundraising
- The Role of Special Events in Fundraising
- Cost Versus Time of Special Events
- The Role of Volunteers
- The Role of Staff
- Donated Services and Goods
- How to Select the Best Location
- How to Budget for a Special Event and Then Manage It
- Planning the Perfect Event
- What Must Be Done after the Event Is Over
- Contracting with Outside Vendors
- Using an Event Management Group
- IRS Regulations Regarding Special Events

KEY VOCABULARY

- Business Reply Envelope (BRE)
- Corkage Fee
- Gifts-in-Kind
- Graphic Artist
- Mail House
- Outsourcing
- Piggybacking
- Public Service Announcement (PSA)
- Service Bureau/Mailing House
- Sponsorships
- Vendor
- Volunteer

THE FUN IN FUNDRAISING

Special events often are called the “fun” in fundraising. When people think of special events, they often think of the large charity balls or theme events such as chili cook-offs, walk-a-thons, race-for-the-cures, golf outings, or the roasts and toasts that they have attended. Most individuals will attend many special events throughout their lives to honor individuals, create publicity, or raise money for a person or cause. This chapter focuses on the special events that are staged to raise funds to benefit an organization or cause.

Normally, there are four reasons to hold a special event: (1) to highlight the public’s awareness of the organization or person,

(2) to raise money to support the interests of the organization or person, (3) to focus attention on the organization’s programs or the causes supported by the individual, and (4) to garner attention from and/or for the organization’s volunteers.

1. To create public awareness. An event can publicize an organization or cause through coverage in the media by carefully placed public service announcements (PSAs), by direct mailing of invitations to people who ordinarily would not be aware of the organization, and by recruiting volunteers to work on the event who had not been involved previously with the cause or person.
2. To raise money. The obvious way to raise money through a special event is by selling tickets and sponsorships. Yet some events do not always break even, let alone make money. Many events will make money through the selling of sponsorships. In addition to selling tickets and sponsorships, other items may be sold through silent auctions or raffles at the event to raise funds—T-shirts, mugs, cookbooks, posters, luxury trip packages, etc. This is called “piggybacking.”
3. To create program awareness. Highlighting the mission and activities of the organization during a special event will create awareness. If someone decides to attend an event honoring a friend or acquaintance and then is exposed to the mission, programs, and activities of the organization, the organization has expanded its audience.

Contact can be made with the community's leadership, those financially able to support the organization, and those who may take an interest in working for the cause.

4. To recognize volunteers. Many events are held just to say thanks to the volunteers who sustain the organization throughout the year. These are not held to raise money, to raise the consciousness of the public, or to introduce new and innovative programs. They are held instead to say thanks to those who have given so unselfishly of their time to the cause. Other goals also can be obtained when honoring volunteers. Well-placed feature articles with photos of key volunteers can garner the recognition that the organization often needs and can attract more volunteers who want to be associated with a "winning cause" and the "right" people.

In capital campaigns, special events can provide an opportunity for continued contact with donors. Groundbreaking ceremonies, donor-recognition dinners, unveilings of donor recognition walls, tours of new facilities, and other special event opportunities associated with a capital campaign (see Chapter 14) are perfect forums for recognizing volunteers and attracting new volunteers and donors to the cause.

The most important questions to ask before planning or holding a special event are these:

- Is it necessary to hold an event?
- What is this event expected to do for the organization—raise funds, raise public awareness, honor volunteers?
- What type of event is best for the organization?
- Will it fit the organization's mission and the community?
- Is there adequate staff and adequate volunteer assistance to stage a successful event?
- Does the organization have the financial resources to undertake a special event and, if so, of what magnitude?
- Will an event bring cohesiveness to the staff and volunteers?
- What is the competition doing? Will this event compete with any events they are holding or are planning?

Once these questions are answered and a decision is made to plan and hold an event, enough time must be allowed to organize it well. At least six months to a year should be allowed for planning and organizing a major event. Although it is possible to plan and execute an event in much less time, it is always wise to allow enough time for thorough planning. Exhibit 12-1 lists questions to help you determine if you are ready to undertake a special event.

In addition, the type of event should be carefully selected. Consider whether this event could be instituted as a yearly event for the organization. Just as the breast cancer organizations have race-for-the-cure 10 kilometer races each year and the National Kidney Foundation has kidney bean chili cook-offs, an organization may have a theme that could be made into an excellent special event. Two good examples of this are the

Exhibit 12-1 Are You Ready to Have a Special Event?

Below are some key points to consider when deciding whether or not your institution should have a special event.

- Will your event be important enough to attract the attention of the groups you want to reach?
- Is the event significant in that it supports some aspect of the organization's overall program, policies, and purposes?
- Can you identify a cadre of volunteers who are willing to do the multitude of tasks necessary to be successful?
- Can your institution justify the time, effort, and cost involved?
- Do you have an idea that is interesting and different that can be presented in an entertaining or dramatic format in order to hold the attention of the audience?
- Will your event create a desire in people to respond in some way—to make a decision, to join or participate, to support through volunteer service, or to make a financial contribution?
- How much publicity will you be able to generate through newspapers, radio, and television?
- Have you attended and observed a variety of special events to assess what is appealing?
- Is there a special occasion that should be commemorated, such as an anniversary, new administrator, new building, new organization name, etc.?
- Are similar events already being done by organizations in your community and if so, is there room for another or can you do your event better?
- Is the proposed event appropriate for your institution?

Source: Reprinted with permission from LuAnn Davis, *Start Up: A Fund Raising Guide*, "Are You Ready to Have a Special Event?"

Texas State Society's "Black Tie and Boots" gala and the Illinois State Society's Inaugural Gala, which are held every four years in Washington, DC, to honor the newly elected president and vice president of the United States. More than 12,000 people attend, and enough money is raised to keep the organizations operating for four more years, until the next inaugural galas. Another example is the annual "Black and White" ball held in San Francisco.

After the type of event is decided, careful consideration should be given next to the theme and the location site. Aim for fun and excitement. Is there a recently opened or renovated building that everyone is waiting to see? If so, determine if the event can be held there. Is there a site that is open to the public only during the day that would consider opening its doors in the evening for an event? Museums, zoos, parks, and public buildings such as post offices, banks, historic homes, and historic sites often will open their doors after hours for a fee. This helps them to underwrite their operations as well as provides exciting places for events to be held. Look for something new and different. People quickly tire of the same old black-tie, sit-down dinner event and long for something creative and exciting.

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exciting. In fact, more organizations are emphasizing more informal gatherings rather than black tie.

Establish your budget early. Determine all of the costs of the event, then price the tickets to not only cover the costs but to make a profit. Then consider whether the community and the audience being invited can afford the price of the tickets. If they cannot, then rethink the event and what it offers to those attending. Can less be offered and the event still interest people in purchasing tickets? Perhaps it is best to rethink the event entirely. On the other hand, the ticket price may be too low. After comparing what other organizations have charged for their events, rethink the ticket price. It is better to have conducted this analysis beforehand than to print and mail the invitations and find that no one attended because the tickets were too expensive or find that you are in the “red” because the ticket price did not cover all of the costs of the event.

Sponsorships can be sought to offset the cost of a special event and to keep ticket prices low. Different levels of donor sponsorship also can be established to entice sponsors and to increase the amount of money to be made. For example, a “Silver Circle” sponsor may receive a table for 4 and recognition in the brochure for a cost of \$2,500. Those sponsoring at the “Gold Circle” level may receive a table for 8, be given recognition in the brochure, and have one of the honorees seated at their table for a cost of \$5,000. “Platinum Circle” donors may receive a table for 10, be given recognition in the brochure, have an honoree seated at their table, plus be included in a before-dinner private reception with all of the honorees. The price for this level of sponsorship could be \$10,000. Some donors will be willing to pay more for a higher level of recognition or access to those being honored.

As mentioned above, private prereception gatherings can be held for the highest level sponsors to not only meet with the guests of honor before the event, but also to meet other attendees. Plus, an “after-glow” party can be held affording an opportunity to all of those attending to mix and mingle or to network after the sit-down dinner. This works especially well with events honoring people with awards.

A good example of using both types of receptions is the American Society of Civil Engineers’ OPAL Awards Gala, where those receiving OPAL awards meet with VIP guests and the prereception and dinner sponsors and their guests. Later, all attendees are invited to continue the evening at an after-glow reception, again a sponsored event. One of the masters of using an after-glow networking reception is the American Society of Association Executives, which holds this type of sponsored event at their annual conference.

In addition to selling tickets, there are other ways of raising money at an event. For example, if programs are going to be printed for a special dinner, space in the program can be sold for advertisements. Also, if a cash bar is part of the event, a certain amount of the price of a drink can be set aside for the charity. Other merchandise can be sold in support of the cause or to cel-

brate the event. At some events, a photographer may be hired to take photos that are then sold to those attending. These photos usually are adorned with a logo or some other indicia to note the event. In addition, raffles or auctions can be held to bring in more revenue. The actual dinner may just break even after expenses, but an event can still make money through these other creative means.

One of the best ways to make money is to save money—by looking for donated goods and services. Seek the vineyard or liquor wholesaler who will donate the wine or alcohol for the event in return for recognition in the program, at the bar, and on the dinner table. Find the printer who works for the organization or other printers who will print invitations for free or at least provide upgraded paper from overstock or special ink colors at no charge. Locate the restaurants, merchants, and other vendors who would like to receive publicity by donating goods or gifts-in-kind to the event. If an item is part of the budget, look for creative ways to obtain it other than paying cash.

THE ROLE OF SPECIAL EVENTS IN FUNDRAISING

Special events are staged to call attention to the organization, cause, or person that they are honoring. Most special events don’t raise a lot of money. Indeed, a special event is fortunate if it breaks even. Many are held despite the awareness that they will cost the organization money. Why are these held? Because they bring something else to the organization—publicity. A special event provides the organization with the opportunity to promote its mission and goals to a constituency that may be unfamiliar with its basic tenets of operation. A new “public” may attend that is unfamiliar with the organization. This is the time to capitalize upon this opportunity by providing information about the organization. Have materials that guests can take home with them to learn more about the organization’s programs. Don’t let those attending leave without providing their name, address, and phone number. If this information isn’t obtained when the tickets are sold, then it must be obtained at the event. These are the source of attendees at future events, potential donors, and possible volunteers. Remember, it is imperative to record who attends your events.

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Just as publicity is important to an organization, so is a continual source of volunteer help. Special events can help increase the public’s awareness of the organization and can attract new volunteers. A special event can be a great opportunity to reach out to the community and recruit new volunteers for the event and for the organization. The excitement and spirit of working on the event can carry over into a desire to work for the organization’s other programs and activities. A special event can make it possible for all types of people to volunteer, not just those that

an organization would normally see involved with their cause. Special events can draw women and men, the young and the old, the rich and the poor, the working and the nonworking or retired, the highly educated and the not-so-well educated, and they can provide a cross section of the demographics of the area. Enriching the organization's volunteer pool through holding a special event may be as important as the amount of money the event will raise for the organization. Many organizations are expanding their volunteer pool by organizing "junior boards" of young volunteers who identify and plan events that focus on younger people and are priced so they can afford to attend. Those attending these events are then encouraged to become volunteers for the organization. See Appendix 12–A, Reaching the New Kids on the (Philanthropic) Block for examples of events planned by and for younger people.

In addition to all of the previously stated benefits, special events allow the organization to enhance its image within the community through promotion and execution of the event. Securing the best possible volunteer leadership will attract others of comparable position and resources. The event must be first class in every way—this does not necessarily mean that it has to be expensive. The organization should be looking for an event that will not only attract people for the evening but one that will have a lasting effect upon those attending. If an event can be "instituted"—draw people year after year and be associated only with that organization—then it has the potential to increase in popularity each year, draw more and more people, raise more and more money, and enhance the image of the organization within the community.

Organizations should not depend solely on special events for their funds but should have a comprehensive, well-defined development plan and operation that includes special events.

COST VERSUS TIME OF SPECIAL EVENTS

Special events can be costly not only in dollars but in time. The planning of a large event alone can take months. Staff time is taken away from other tasks that normally bring money into the organization. Before deciding to undertake a special event, an organization must decide if this is the wisest method of raising money or creating publicity. It may be the best event ever held in the city with the biggest names in attendance, yet the organization may lose a fortune in staff time and money.

Ask the following questions:

- Is there sufficient available time and staff to plan and execute this event?
- What will this event do for us?
- What could staff members be doing with their time if they were not working on this event?
- Which activity will bring the organization more income and/or publicity?
- Does the organization have the financial ability to hire an event management firm?
- Should the organization spend its money this way?

There are no definitive answers. What may make sense to one organization may not be the answer for another. But whatever the decision, make sure that these questions have been asked and that the many options available are considered.

THE ROLE OF VOLUNTEERS

Most special events run on volunteer energy and expertise. Staff members will usually plan and direct a special event, but typically the volunteer chair and help are the mainstays of most annually held events. Some events are so popular in the community that people vie to be the chair or co-chairs. Volunteers can be used to support events in many different ways. They may loan their homes for parties, house tours, etc.; chair events or committees; use their influence to get underwriting for an event; and cultivate other volunteers for the organization's activities.

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Special events give volunteers an opportunity to learn something new and to have fun with people they know and people they would like to get to know. People will come to a special event one year and find that they have had such a good time that they will volunteer the next year to work on the event. They also will share their enthusiasm with their friends. The best way to find new volunteers is to ask the current volunteers to recommend people they know who are interested in the organization's mission, would work hard on a project, and would represent the organization well.

Volunteers can "make or break" a special event. A good volunteer board and a strong chair are no guarantee that an event will be successful, but they certainly can help. A weak volunteer chair and committee almost surely will bring disaster, unless the staff is strong and large enough to rescue the foundering volunteer effort. Make sure that you select volunteers who will get the job done. It is the responsibility of the staff to make sure that volunteers have a clear understanding of all that is required of them and all of the tools with which to accomplish their job. Exhibit 12–2 lists special event committees.

Often, you may find volunteer honorary chairs who lend their name to an event, but who will do nothing more for the event. This is when the name alone will draw interest to the event, but the person doesn't have the time, or perhaps the health to actually work on the event. Having honorary chairs can add instant credibility to new events.

THE ROLE OF STAFF

In an ideal world, staff members are the planners, and volunteers are the workers. In the real world, staff members and volunteers work side by side to produce special events. It is the responsibility of the staff to have the entire event planned in advance down to the smallest detail. Then the staff must train and motivate the volunteers and guide them through the many

Exhibit 12-2 Special Event Committees

- Event Management (Executive Committee)—sets direction, selects theme and date
- Arrangements —plans logistics, contracts for site, selects menus, delegates many details to subcommittees
- Ticket Sales—arranges for distribution and sale of tickets
- Promotion—promotes the organization and all event sponsors, as well as the event
- Publicity—publicizes through press, radio, television, and other media
- Decorations—plans and organizes all decorations around theme
- Finance—controls budget, collects funds, maintains records
- Clean-up—cleans up after the event
- Gifts and Prizes—promotes door prizes and gifts (if there are to be any)
- Entertainment—selects and books entertainment
- Printing—arranges for printing posters, tickets, programs, etc.
- Advertising—arranges to sell advertising for programs; places ads for benefit
- Program—is responsible for editorial content, printing, and distribution of program

Source: Reprinted with permission from Henry Rosso, "The Fund Raising Benefit," *The Fund Raising School Manual*.

stages of the event. Also, the staff must later direct all of the accolades to the volunteers.

There are several points to keep in mind when working with staff and volunteers during the planning and execution of a special event. The following list is just a sample of what should be expected of both:

- Be selective when choosing which staff and volunteers will work the event. Not all people will be good representatives of the organization in a public event. Some people work well behind the scenes but cannot handle stressful situations, make quick judgment calls, or deal with irate individuals.
 - Train both the staff and volunteers well ahead of time. It is important for them to have a clear understanding of what will be expected of them during the event. Don't assume that they will have previous special event experience.
 - Be cautious of the volunteer who wants to be part of the event because it will be fun. Staff and volunteers will be working at the event, not participating as guests.
 - Arrange for a site visit before the event. All workers should be familiar with the general floor plans of the event location—the entrances, emergency exits, restrooms, coat check rooms, security, and so forth.
 - Provide volunteers and staff with guidelines on the appropriate dress for the occasion. If it is a black-tie affair, the males may have to rent tuxedos if they don't own them. This may be expensive, so they should have ample time to prepare and budget for this particular event or choose not to volunteer for it. Women should be encouraged to wear low-heeled shoes and clothing that is comfortable yet appropriate to the event.
- Have an adequate number of staff and volunteers assigned to work the event. It is better to have too many than too few. Plan on having several assigned to the chair or co-chairs to act as "runners" and "special needs" persons. The last thing an event chair wants to be concerned about is where are the staff and volunteers?
 - No staff or volunteers should be seated before all of the guests are seated. Nor should they have drinks, unless it is appropriate. In fact, staff and volunteers should be instructed to ask the guests of honor if they would like to have their drinks held for them while photos are being taken. In addition, it is suggested that staff or volunteers hold name tags when photos are being taken, as the photos will look much better when printed in newsletters, newspapers, or magazines.
 - Staff should have adequate time to prepare for an event. Don't think that staff members can organize a major special event in addition to all of their other responsibilities. If the development director cannot be given the time to plan appropriately, then hire an events management firm and let the development director manage or coordinate the firm's activities.
 - Don't depend on promises made by anyone. Plan ahead for all possible contingencies. Staff and volunteers should be empowered to make decisions on the spot. Only well-prepared and well-trained staff and volunteers can make effective immediate decisions.

DONATED SERVICES AND GOODS

A great way to save money on an event is to get as many of the goods and services donated as possible. Examples include the donation of small items, such as the gifts to be given to the guests of honor and the favors to be given to the guests, as well as the donation of more expensive items, such as the printing, the wine, or the food. Use any contacts that the organization has—the contacts of the board members, the committee members, and the staff.

A printing company may be willing to "run" an invitation package at the same time it is printing materials for another client and do the work for cost or even simply in return for the visibility it will receive. The company may be acknowledged in the program, on the back of the invitation, in the organization's newsletter or magazine, etc. See what similar "deals" can be struck with other vendors.

A speaker may be willing to donate his or her honorarium to the organization in return for a tax write-off. Also, don't be afraid to contact celebrities who have an interest in the organization's cause and may be willing to donate their time to help the organization. But be careful in making arrangements with celebrities. They may provide their time for free, but they may want to be reimbursed for their expenses, which could be greater than expected or unreasonable given the organization's budget. Make sure that all agreements are in writing.

Think in terms of who can help and why they would want to be of service to your organization. For example, when planning an awards dinner honoring a top Russian official one year, the American Center for International Leadership (ACIL), based in Denver, Colorado, and associated with the University of Denver, contacted the Russian consulate and asked to borrow a Russian flag to use at the podium along with a flag from the United States. The consulate was pleased to comply, saving ACIL from having to purchase a flag costing approximately \$150. For the same event, ACIL asked one of its board members who owned a vineyard to donate wine for the awards dinner. Even though the hotel charged a “corkage fee,” it was substantially less than the cost of the wine, thus saving the organization considerable money on the event. Again, an alumna of ACIL who worked for a florist received an invitation to attend the dinner. She replied favorably and asked if ACIL had selected a florist to provide flowers for the evening. As it had not, it worked out an arrangement with the florist that saved it considerable money on the purchase of centerpieces for the tables and gave the florist excellent visibility in the event program.

HOW TO SELECT THE BEST LOCATION

All cities have buildings that are available for special events, and actually some buildings depend upon outside events for their

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operating budgets. Consider museums, historical homes, or places to which the invited guests normally would not have access. Many times people will

want to attend an event to be able to enjoy the location or to be able to say that they have “been there.”

Be concerned about the cost of the site. Many organizations just can’t afford to spend \$10,000 to \$20,000 to rent a museum for an evening event. Be creative in your thinking. In Chicago one of the most successful yearly fundraising events supporting the Boy Scouts is held in downtown Chicago in the “Loop,” where the “financial block” of LaSalle Street is closed off for the evening. Tables, bars, bands, etc., are set up right in the middle of this normally very busy thoroughfare. Businesses purchase tables, individual tickets are sold, and the merriment begins immediately after the close of the workday and goes well into the late evening or early morning. Obviously, in Chicago the event is held in the summer!

Thinking “outside the box” can save much money. The Kiwanis in Arlington, Virginia, were seeking a site location for their annual pig/oyster roast. After viewing several locations, one of their active members offered his car dealership for the event. The service bays were steam washed, and rolls of white paper were hung to cover anything unsightly. Ten-foot tables and folding chairs were set up throughout the site and no one cared if anything was spilled. Plus, the event could be held rain or shine.

You will have much more flexibility working with a site other than a hotel. There is room for bargaining at hotels, but not as much as when working with different vendors and caterers at private locations. Remember that caterers can serve food in locations where there are no kitchen facilities. Don’t let the lack of a kitchen stop you from selecting a site.

If the location is to be in an urban setting, make sure that there is ample parking or that valet parking has been arranged. Being near a metro or bus stop also is helpful. Alerting taxi companies to the location and ending time of the event is a courtesy to guests. Also, make sure that the site is safe and acceptable to all religious, ethnic, or special interest groups. If the event is being held outside, be sure to plan for inclement weather, insects, and possible noise interference. Whatever site is chosen, be sure to make arrangements with someone with authority who works at the location to be available on the day of and during the event to resolve any unforeseen emergency that may arise.

HOW TO BUDGET FOR A SPECIAL EVENT AND THEN MANAGE IT

Every special event should have a budget. To build a budget for an event, several things must be considered, including the following.

The Facility or Location

The first thing to consider is where the event will be held and how much it will cost to rent the facility. Will furniture be provided or will tables and chairs need to be rented? Is there a public address system and podium? What other audiovisual equipment is available, and is there a cost for its use? Is janitorial service provided both before and after the event and at what cost? Is parking available that is convenient and affordable for the guests? Will there be a need to contract for valet parking? Have local taxi companies been told about the closing time for the event so, when the event ends, cabs will readily be available for guests.

Food, Beverage, Catering, and Decorations

Does the location have food service capabilities and are they of the quality that will be needed for the event? What is the cost of these services compared to outside caterers? Can outside caterers be used? Are the linens of the quality or style that are desired for the event? Can other materials be used? What kind of food and drink should be provided? Will alcohol be served? Will it be an open or cash bar? What prices should be charged for drinks? Will the facility or caterer allow the organization to make money from the sale of drinks? Will they allow food or alcohol to be donated? Consider that outside caterers may be more expensive than using the facility’s food service.

Invitations, Programs, and Place Cards

How many people will need to be invited to “break even” or make money on the event? Will the facility being considered hold that many people? What are people in the community accustomed to paying for a special event of the type being planned? Can all of the costs be covered and a profit still be made when charging this amount? What type of invitation should be sent? Will a graphic artist design the invitation? What image should the invitation convey—flashy, conservative, frugal, wealthy, sophisticated, homey, exciting, glamorous, etc.? Will there be a program for the event? Will place cards be used if the event is a sit-down breakfast, luncheon, or dinner? Exhibit 12–3 lists what to include in an invitation for a special event.

Mailing

Is the mailing to be personalized? Should first- or third-class postage be used? How long before the event should the invitations be mailed? Will you send a “hold the date” mailing? Is money budgeted to have a mailing house do this work?

All invitations to small, intimate events should be sent by first-class mail with stamps affixed. Do not use a first-class indicia on the invitations, even though it will save time. Indicia may be used for the “hold the date” mailing. Select a stamp that will coordinate with the invitation package. If it is springtime, for example, select a stamp with flowers. If the event is being held

around Christmas, select one of the holiday stamps. If your event is political, then select the American flag or one of the many stamps with an eagle. Consider how the stamp will look with the colors, shape, and size of the envelope. If money is available to spend and has been budgeted for a mailing service, paid staff, or a mailing house can be hired to provide these services. However, a considerable amount of money can be saved by using volunteer help to do the necessary work—stuffing, sealing, and stamping the invitations.

If a large event is being produced, especially if mailing lists will be rented, it is not as necessary to use first-class postage. For example, if the hottest ticket in town is to an inaugural ball or the annual black and white ball, then the recipient usually does not care if the invitation arrived with a first-class stamp or was mailed bulk mail. If the event is that popular, then the organization can afford to skimp on the “look” of the postage. But if the event is new to town and not everyone is vying for an invitation, then mail with a first-class stamp. Also, if there is a short time frame, don’t take chances with anything less than first-class mail. An invitation that arrives after the event is held not only is an embarrassment for the organization but obviously will not bring any people or money to the event. Appendix 12–B shows an attractive example of a “save the date” card, which shares with the recipient the excitement of the upcoming event. Hold the date cards serve as a pre-invitation to the event.

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Exhibit 12–3 What to Include in an Invitation to a Special Event

- Name of the event
- Name of the organization holding the event
- Location of the event
- Date and time of the event—include p.m. or a.m.
- Compelling description of the purpose of the event or the cause it supports
- Price of admission—this may include several levels of pricing depending upon what is offered with the event
- RSVP date and phone number so people can inquire about any detail you may have forgotten, a way to contribute to the organization if they cannot attend the event, to volunteer for the organization, or whatever may be of importance to a potential attendee
- Name of organization to which checks should be written
- Date by which checks must be received, tickets purchased, tables reserved, etc.
- Tax status of the organization and exactly how much of the cost is tax-deductible to the attendee
- Name of volunteer chairs and committee members
- Attire expected of attendees—black tie, white tie, country-western, tartan plaid of your clan, etc.

Source: Adapted with permission from M. Guellich and L. Davis, *Fundamentals of Fundraising: A Capital View*, © Association of Fundraising Professionals, Greater Washington, DC, Area Chapter.

Photographers and Video Operators

Is there a plan to have photos taken at the event? Will the photos be used for public relations or media efforts or to make extra money by having photos available for sale after the event? Will the photos be used in future publications of the organization?

Is there a need to have the event videotaped? Can video footage be used in future videos developed for the organization?

If the photos are to be used in publications or on the organization’s Web site, be sure that the photographer is taking digital photos.

Speaker’s Honorarium

Will there be a speaker or speakers at the event? Will a fee be charged for their services? Will their expenses need to be paid—transportation, food, lodging, etc.? Will gifts be given to the speakers and their spouses? Be careful to select gifts that represent the organization and do not cost too much. Many quality stores have crystal, silver, and pewter gift items that can be personalized for the event or person. Allow enough time for engraving. At high-end stores, engraving can take several weeks, as it is done by hand and not by machine.

Optional Items

What other items are needed to create a spectacular event that will raise money for the organization? Use all of the creative powers of the staff and volunteers to think of ways to make the event special. Then include these expenses in the budget.

PLANNING THE PERFECT EVENT

It is not necessary to invent a new event each year. Most organizations use the same event year after year with great success. Often, though, an organization will want to try something new to create a sense of excitement and anticipation. Appendix 12–C shows an example of an invitation that was designed to use the Valentine’s Day holiday as the theme for their event. The reply card and envelope for this event are shown in Appendix 12–D along with examples of other materials used in special events. Appendix 12–E provides a workbook of checklists for events and meetings. Exhibit 12–4 is a list of Seven Tips for Planning Your Next Event. As more and more organizations offer events, it is important to know the organization’s constituency to create an event that guests will enjoy not only once, but again and again.

Information or Activities Required for a Successful Event

Time Line

Once a decision is made to hold an event, the most important first step is to develop a time line. Start by working backward from the date of the event and include all the steps that will need

to be taken to complete the event. For each task to be completed, ask questions such as the following:

- When do the invitations need to be received for individuals to RSVP by a particular date?
- When will the invitations need to be mailed?
- How much time is required for the printing, folding, inserting, and stamping process before the invitations can be mailed?
- Will the invitation be the same as last year’s or will new artwork need to be designed?
- How much time will a redesign require?

By answering these questions, the amount of “lead time” can be determined and a time line begun for each step of the event. No event should be undertaken without an established time line. Exhibit 12–5 provides a time line for producing a successful special event.

Budget

Once a time line has been developed, the next step is to create a budget based on the needs identified within the time line. Develop the budget by using the concept of “zero-based budgeting”—attach a cost to every item whether it is to be donated or the department already has it. From rental of the site to the food served, the printing of the invitation, the salaries of the staff, the reimbursed expenses of the volunteers, the tape, paper, staples, etc., purchased—all should be included. The budget should reflect the real costs of the event. If items are donated, then this can be shown later as a savings. Also include in the budget other sources of revenue that are planned to be implemented, such as

Exhibit 12–4 Seven Tips for Planning Your Next Event

Given that the number of fundraising events continues to grow, events today represent a tremendous range in size, style, purpose, cost, and audience. Here are some tips for you to remember for your next event.

1. One of the greatest enemies of an event is the length of the program. The time to end an event is when your guests still want more. No matter how inspiring or exciting your program, entertainment, and speeches may be, the evening can all be destroyed if it goes on too long. It is both tempting and dangerous to try to include everything in one event.
2. People often measure a fundraising or invitation list by its size. That can often be a misleading measure. A good list of 100 well-thought-out names strongly connected to the event and its leadership can produce more attendees than a more general list of 10,000 names.
3. The ability to create an event that reflects the unique character and personality of the host organization and the cause it represents is an important part of making the event a success and an attraction for the targeted audience.
4. The food at a fundraising event can be simple and not fancy, but it must be delicious. No one likes bad food.
5. The building and management of a good professional team to produce an event is another critical aspect of success. Recruiting the right combination of vendors such as graphic designers, caterers, stage managers, technical firms, and designers helps build a team with mutual respect and trust. This can make all the difference in the product.
6. More and more people say they would rather send a check than attend another event, yet more and more people find themselves attending events. The important goal is to create an event that guests will not only enjoy attending once, but will look forward to attending again and again.
7. In designing an event, it is important to know your audience and first answer the question of what you need to do to get their attention and their attendance. Once you get them to attend, it is important to know exactly with what you want them to walk away and how you plan to achieve that.

Source: Courtesy of Lansdale Associates, Events Consultants, Washington, DC.

Exhibit 12-5 Time Line for Producing a Successful Special Event

EVENT PLANNING CALENDAR FOR A MAJOR HOLIDAY BALL													
ACTIVITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
Present fundraising event idea to board for approval of event, goals, and budget.													
Develop, select, and recruit honorary committee and committee chairs. Post on Web site.													
Secure the site and date for the event.													
Post "hold the date" on Web site.													
Establish dates for monthly committee meetings with tentative, more frequent meeting dates just prior to the event.													
Establish theme, type of food and beverage service, and ticket prices for the event.													
Identify honorees, speakers, or celebrities who are willing to lend their name to the event and solicit. Post on Web site.													
Contact honorees, speakers, and celebrities to confirm their attendance.													
Solicit sponsors for the event. Post on Web site.													
Meet with the caterer or hotel to arrange for food, beverage, flowers, AV, and other event details.													
Arrange for entertainment.													
Determine extent of decorations and make arrangements.													
Send "hold the date" cards to constituency.													
E-mail Hold the Date information to constituency.													
Contract with artist to prepare event's printed materials.													
Approve artwork and order printing.													
Secure purchased or donated magazine space and mail ads.													
Recruit and assign volunteers.													
Collect items donated by sponsors for raffle, silent auction, or door prizes.													
Mail invitations.													
Send e-mail invitations.													
Mail press releases to newspapers and PSAs for radio stations.													
Send announcement of the event to local magazines.													

continues

Exhibit 12–5 Time Line for Producing a Successful Special Event (continued)

EVENT PLANNING CALENDAR FOR A MAJOR HOLIDAY BALL													
ACTIVITY	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN
Place announcements of the event in newspapers and on organization’s Web site.													
Try to get a feature story about the event or the persons involved in the event in local newspapers and on television.													
Hold final committee meetings.													
Script the event: devise a minute-by-minute event schedule.													
Get attendee list from sponsors.													
Call honorees, speakers, and celebrities to remind them of the event and provide them with event details.													
Call volunteers to inform them of their duties and confirm their attendance.													
Call the honorees, speakers, and celebrities to confirm their itinerary and the event schedule.													
Notify members of the media about the event and inquire about their attendance. Arrange escorts.													
Send out press releases after the event.													
Post photos from the event on organization’s Web site.													
Hold a thank you party or wrap-up meeting for staff and volunteers.													
Send out thank you letters to sponsors, speakers, celebrities, and volunteers.													
Hold a “hot-wash” or “post-mortem,” including both staff and volunteers to analyze the strengths and weaknesses (opportunities) of the event. Capture these in writing to be used when planning future events.													

Source: Courtesy of Gerry Frank, President, *INN*dependent Management Group, Alexandria, Virginia.

the sale of T-shirts, mugs, hats, other trinkets, etc.; the raffling of items in an auction; or other opportunities that will bring in money from sources other than ticket sales. Ticket prices should be determined after the budget is completed. Remember to compare the proposed ticket price with what your competition is charging for their special event, or to other events that are being held in your community. Exhibit 12–6 provides a checklist for budgeting for a special event.

Staffing

Determine the number of professional staff persons needed to successfully plan and execute the event. In addition, plan for the

number of volunteer committees that will need to be chaired and staffed by volunteers. Don’t forget to include these costs in the budget. It may be possible to determine these numbers based on how the event operated in the past. If the event is new, ask other organizations that have held similar events how they staffed their events. Make calls outside of the immediate area and ask similar agencies what they have done and how their events were staffed. This will be the time to decide whether an events firm should be hired. If it appears that it will cost the organization more in staff time, resources, and money to run the event internally than it would to hire an outside firm to do the work, then the correct decision may be to hire such a firm.

Exhibit 12–6 Checklist for Budgeting for a Special Event

A. The Facility/Location			
1. Cost of the facility	\$ _____	3. Secretarial support	\$ _____
2. Table and chair rental	\$ _____	4. Food for volunteers coordinating the mailing	\$ _____
3. Public address system and podium	\$ _____	5. Cost of mailing lists	\$ _____
4. Janitorial and grounds services	\$ _____	E. Photographer or Video Operators	
5. Parking and valet services	\$ _____	1. Photographer	\$ _____
6. Tent, awnings, and canopies	\$ _____	2. Video operator	\$ _____
7. Flooring and carpeting	\$ _____	3. Lighting	\$ _____
B. Food, Beverage, Catering, and Decorations		4. Staging and backdrops	\$ _____
1. Food	\$ _____	5. Staff assigned to work with photographer or video operator	\$ _____
2. Beverages	\$ _____	F. Honorarium for Speaker(s)	
3. Linens	\$ _____	1. Fee	\$ _____
4. Flowers and plants	\$ _____	2. Transportation	\$ _____
5. Signs and posters	\$ _____	3. Lodging	\$ _____
6. Decorations and flags	\$ _____	4. Food	\$ _____
7. China and silver	\$ _____	5. Gifts	\$ _____
C. Invitations, Programs, and Place Cards		G. Publicity	
1. Invitation	\$ _____	1. Write PSAs and other press releases	\$ _____
2. Reply card	\$ _____	2. Select photos for promotion	\$ _____
3. Carrier envelope	\$ _____	H. Other/Miscellaneous	\$ _____
4. Reply envelope	\$ _____	SUBTOTAL OF COSTS	\$ _____
5. Postage	\$ _____	SUBTRACT COSTS OF ANY ITEMS DONATED	– \$ _____
6. Inserts	\$ _____	GRAND TOTAL OF COSTS FOR THE EVENT	\$ _____
7. Program	\$ _____		
8. Place cards	\$ _____		
9. Table numbers and names	\$ _____		
D. Mailing			
1. Postage	\$ _____		
2. Service bureau or mailing house	\$ _____		

Source: Courtesy of Gerry Frank, President, *INN*dependent Management Group, Alexandria, Virginia.

Publicity

The success of a special event can depend upon the amount of publicity generated to promote it. To be successful, people need to know about the event and have the desire to attend it. They need to perceive that it is something special and that they want to be a part of it. Publicizing an event is also another way to highlight the involvement of local volunteers. Photos can be taken during dress rehearsals or some other preliminary activity of the event and then sent to the local papers and posted on the organization’s Web site with an accompanying article featuring the event and the volunteer help. This can be a motivator for the volunteers, recruit additional interest in volunteering in the community, and further promote the event. The important questions are why the event needs media coverage and who will benefit from it. When these can be answered, there are several ways to publicize a special event.

The success of a special event can depend upon the amount of publicity generated to promote it.

External

1. Radio stations. PSAs should be written and delivered to the local radio stations three to four weeks before the event. These should be 15, 30, 45, and 60 seconds long. They need to cover the Who, What, Where, When, and Why of the event. Attach a fact sheet about the organization in case the station wishes to promote the event beyond what is written in the PSA. The station also may wish to interview some of the celebrities who will be attending or the persons whom the event may be supporting or benefiting. It even may be possible to have the volunteer chair of the event interviewed. Deliver the media package in person to the station manager if possible.
2. Television stations. Contact the local television stations and provide them with the same media kit. Ask if they will be willing to tape a segment promoting the event. This may be possible if the event involves or benefits the entire community.
3. Newspapers. Develop a press release to distribute to all of the local newspapers as well as those in surrounding com-

munities. Don't forget the weekly community newspapers or the monthly "shoppers" papers. If there is a college or university in the area, be sure to include its papers (and radio or TV stations) also. Make sure that the press release is delivered to the correct editor (sports, food, entertainment, home, etc.) and that one is included for the editor of the community calendar.

4. **Magazines.** More lead time is required for information to be printed in a magazine than in a newspaper. Most magazines for large cities have a monthly calendar of events, and this is probably the best location for an event to be publicized.
5. **Local business.** Ask the editors of corporate newsletters of local businesses to include an article on your event. This can be particularly successful if volunteers for the event work for one of these companies. The company probably will be pleased to highlight the volunteer activities of its staff. If the company provides services to the local and surrounding communities, it may be possible to have the company highlight the event in the newsletter that accompanies its monthly invoices. For example, the local electric or gas companies may include information on nonprofit events that will benefit their customers. In addition, local companies may be willing to post flyers or posters on their bulletin boards. Don't overlook banks, grocery stores, restaurants, service stations, movie theaters, beauty salons, etc.

Internal

1. Post all details pertinent to the event on the organization's Web site. Begin with a hold the date announcement on the Flashpage and then update weekly as the event unfolds; when honorees are selected, place their photos and bios on the site. When ticket prices are established, indicate when, where, and how they can be purchased.
2. Use all of the organization's media pieces to promote the event. In the newsletters to members, donors, volunteers, the community, etc., place "hold the date" announcements, feature articles, etc. Appendix 12-F shows an example of an invitation sent via postcard that also includes upcoming events on the reverse side of the card. This is an inexpensive, yet attractive way of promoting an event to members while reminding them of upcoming events.

Exhibit 12-7 shows a sample planning calendar for event publicity.

Evaluation

Often it is easy to forget that all events conclude not with the close of the evening's activities but with an evaluation of the overall successes and failures of the event. An evaluation should take place, not the morning after an event, but within two weeks—long enough to allow the staff an opportunity to rest from the stress of producing the event but not so long that details are forgotten. This is also the time to plan for follow up

on the event—how to capitalize on its success or "mend fences" that need mending as a result of its failures. All too often this step is forgotten. It may not take much to keep "the ball rolling" and continue the momentum of the moment. Have thank you notes been sent to the sponsors, volunteers, and those who provided gifts-in-kind? Should telephone calls be made instead of notes being written? Have lists been made of attendees who are new to the organization? How will they be included in future activities? Did this event make money? Could the event have made more money? What should be done to make the event better the next time? Use this opportunity to measure the success of the event and to set the course for the next year—whether it involves this event or some other in its place. Exhibit 12-8 is an example of a special event evaluation form.

Special software programs are designed to help manage all aspects of special events—from invitations, registrations, and attendance to the to-do lists, name badges, seating and group assignments, and "event-day" reports. These programs usually are flexible in design so they can handle all event types, including black-tie dinners, class reunions, annual conferences, walkathons, golf tournaments, etc. They also provide standard and custom reports to assist the development staff in reporting to its board or in analyzing the successes or failures of its events. These programs range in price and usually come packaged with other fundraising or association management software programs.

WHAT MUST BE DONE AFTER THE EVENT IS OVER

Many people think that when the event is over, all of the work has been completed. Unfortunately, this is not so. In addition to the evaluation that must be conducted, everyone who has contributed to the success of the event must be thanked. This includes everyone from the chairs of the event to the sponsors and those who donated gifts-in-kind. All outstanding bills must be paid promptly. If a vendor provided special services, include a thank you letter. It is important to ensure the vendor's participation the next time the event is held. At some point, be in touch with all of those who attended the event. Put them on the list to receive the organization's newsletter. Try to cultivate these people to become annual donors or volunteers for the organization's next event.

CONTRACTING WITH OUTSIDE VENDORS

From caterers to printers, vendors are part of the special event scene. Providing the necessities for the event, vendors can make the event a success or a disaster! It is imperative that the development staff be familiar with the quality of work or goods that a vendor is going to provide. Check references. Attend an event that is featuring the vendors being considered. Listen to the music, sample the food, review printed materials. Call references before signing any contract with a company. It ultimately comes down to "doing your homework." Thoroughly investigate all vendors before agreeing to use them for an event.

Exhibit 12-7 Planning Calendar for Event Publicity

ACTIVITY	6 MONTH	WEEK 12	WEEK 11	WEEK 10	WEEK 9	WEEK 8	WEEK 7	WEEK 6	WEEK 5	WEEK 4	WEEK 3	WEEK 2	WEEK 1 EVENT	POST EVENT WEEK
Send out "hold the date" announcements. Post hold the date on the Web site.														
Write PSAs and identify media to which publicity will be sent. Develop a database.														
Send out press releases announcing the event to the calendar of events editor of area magazines.														
Develop database to whom invitations will be sent.														
Prepare labels or write addresses on invitations. Stuff envelopes.														
Send out invitations.														
Send e-mail blasts to promote event to internal and external constituencies.														
Send out PSAs to local and regional radio and TV stations.														
Send out press releases announcing the event to all local and regional newspapers. Post on Web site.														
Contact feature story editors of area newspapers and request that a feature story be written on the event.														
Arrange for the local media to cover the event. Assign personnel to escort each media group.														
Send out press releases with photos recapping and publicizing the success of the event. Post photos of the event on your Web site.														

Source: Courtesy of Gerry Frank, President, IN/Independent Management Group, Alexandria, Virginia.

Exhibit 12-8 Special Event Evaluation Form

NAME OF EVENT _____
DATE _____
SUCCESS OF DATE AND TIME _____
SUGGESTED DATES AND TIMES _____
NUMBER OF GUESTS ATTENDING _____
NUMBER OF STAFF ATTENDING _____ WORKING _____
SITE LOCATION _____
SITE APPROPRIATE OR NOT _____
SUGGESTED SITES FOR FUTURE _____
VOLUNTEER LEADERSHIP _____
GENERAL CHAIR _____
COMMITTEE CHAIRS _____

TOTAL VOLUNTEERS INVOLVED _____
ESTIMATED HOURS OF WORK _____
SUGGESTED GENERAL CHAIR FOR NEXT YEAR _____
SUGGESTED COMMITTEES FOR NEXT YEAR _____

SUGGESTED COMMITTEE CHAIRS FOR NEXT YEAR _____

NUMBER OF PROFESSIONAL STAFF WORKING EVENT _____
EVENT DIRECTOR _____
STAFF COMMITTEE ASSIGNMENTS _____

ESTIMATED HOURS OF STAFF WORK _____
MONEY RAISED
TICKET SALES \$ _____
OTHER SOURCES \$ _____
GROSS \$ _____
NET \$ _____
EXPENSES
VOLUNTEER \$ _____
STAFF \$ _____
EVENT COSTS \$ _____
TOTAL EXPENSES \$ _____
TOTAL—INCOME MINUS EXPENSES \$ _____

continues

Exhibit 12-8 Special Event Evaluation Form (continued)

- 1. Considering the time invested by staff and volunteers and the total net dollars raised, is the event worth repeating?
 YES _____ NO _____ COMMENTS _____

- 2. What are the benefits to those attending? _____

- 3. What are the drawbacks to holding this event? _____

- 4. What problems occurred while planning or executing this event that could be prevented in the future? _____

- 5. What changes should be made before holding the event again? _____

- 6. Why, in your opinion, was this event successful or unsuccessful? _____

- 7. Please comment on the overall performance of the professional staff in executing the event including both positive and negative observations _____

- 8. Comment on the overall performance of the volunteer involvement with the event including both positive and negative observations _____

- 9. Was there enough internal and external publicity to promote the event? _____

- 10. Other remarks pertinent to this event _____

- 11. _____ I would be willing to work on this event again.
 _____ I would NOT be willing to work on this event again.

NAME _____
 ADDRESS _____
 PHONE _____ FAX _____ E-MAIL _____
 SIGNATURE _____
 DATE _____

Source: Courtesy of Gerry Frank, President, INNdependent Management Group, Alexandria, Virginia.

Also, make sure that vendors are adequately insured or that the organization is insured in case someone is injured at the event. Usually, a rider can be purchased to attach to the organization's existing insurance policy. This undoubtedly will not be part of the organization's normal insurance unless conventions, meetings, and special events are a part of the organization's everyday operations. If the event is being planned for out of doors or during the winter months, event cancellation insurance should be considered. In all cases where alcohol is being served, liquor liability should be purchased.

There are many outside vendors who offer software that assists with organizing special events. Appendix 12–G is from the article “Five Tips for Making Fundraising Event Registration More Productive” printed in the *Convio Connection* by Convio, Inc., of Austin, Texas. The article describes their registration software, Convio TeamRaiser, which helps event planners increase and organize registrations for their events, particularly walkathons.

USING AN EVENT MANAGEMENT GROUP

Sometimes it is easier to hire a consultant or an events management group to plan and execute a special event than it is to use existing departmental staff. This is called outsourcing. First, consider the magnitude of the event and whether it has been held before, then consider the commitments, skills, and limitations of the current staff. If this is a “once in a lifetime” opportunity (and these are truly rare), and if the staff has limited expertise in this area, then hire an outside firm to produce the event and use the staff solely to manage the firm's activities.

If this is the direction of choice, be very careful in negotiating the contract with the events firm so it is clear just what is expected from them, what will be managed by the development office, and what the true costs of the event will be. Also, include performance standards, fee structures, and the schedule of payment. Don't overlook hidden costs! If you haven't negotiated a contract before, now is not the time to learn. Ask someone from the legal or financial department to participate. It even may be wise to have a board member who can assist with the negotiations or even to hire an attorney. Whatever is done, don't do it in a “vacuum.” Show the contract to the head of finance or the president of the organization before signing anything.

Most event firms are reputable and will do an excellent job. Ask for references and call them! Are the events these firms have organized in the past of the same type the organization wants to hold? Does the image of the event management firm fit with the organization's image? If the organization is promoting gun control and the events firm does the majority of its work for the National Rifle Association, then the organization may not wish to hire this firm even if its credentials are impeccable. Discuss this with the board—do not have any surprises that the board may have to defend.

Events firms also may be able to negotiate better prices with vendors. They work with them every day and continuously steer

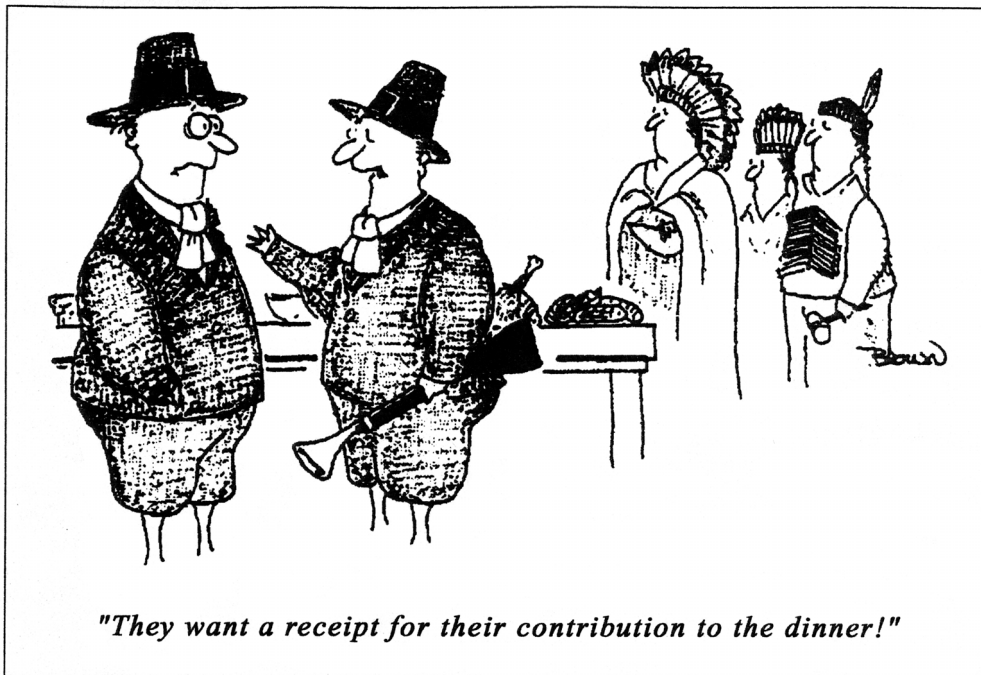
business their way. Printers, musicians, caterers, florists, etc., are more likely to give a break in prices to those who use them frequently than to those who use them once a year. In addition, outside firms even may have better leverage with the organization's volunteers. If volunteers need to be firmly directed, it may be easier to have the staff of the events firm do the directing rather than the development office staff, who will have to work with the volunteers in the future. Also, board members may perceive the events firm as being “more professional” than the development office when it comes to producing special events because this is what the firm does day in and day out. They may be more willing to trust the expertise of this firm and, as a result, not require as much direction from or hand-holding by the development staff. Be sure to have only one person who is responsible for communicating with the firm managing the event. This is usually the most senior person on the staff of the development office. Don't just sign a contract and walk away. Maintain open communications with the firm and communicate frequently. Meet with staff persons from the firm often to make sure that they are on the right course for the organization.

One of the most overlooked advantages of using an outside firm to produce the organization's special events is that the work is not being done in the development office. The entire project will be organized outside—planning, design, mailings, envelope stuffing, telephone calls, and the management of any crisis will not interfere with the everyday workload of the staff. This alone can make it cost-effective to hire an events firm. In addition, the events firm can bring people to the organization who may be interested in the organization's mission and activities—people who may have never heard of the organization before.

Once again, it is very important to check references. Ask what other organizations similar in size have used the firm before. Determine if the events produced for other organizations are similar in scope and visibility to the one your organization wishes to produce. Call those persons who have worked with the firm and ask detailed questions about reliability, pricing structure, creativity, quality, etc. Request a capability package from each vendor—what they will be able to provide to the organization. Additional information regarding the use of consultants in fundraising may be found in Chapter 17.

IRS REGULATIONS REGARDING SPECIAL EVENTS

Beginning January 1, 1994, the Internal Revenue Service (IRS) required that every charitable organization must provide a written disclosure statement to donors who make a payment described as a “quid pro quo contribution” in excess of \$75. This new section of the Internal Revenue Code (§6115) mandates that the charity notify each event participant in writing of what portion of his or her contribution is tax deductible. To determine what portion of the ticket price is tax deductible, total the costs of the food and beverage, printing, postage, etc., and then deduct these from the price of the ticket. If the event includes a theatre ticket, then that also must be deducted at the full box



Source: Copyright © Joseph A. Brown

office price charged by the theater, not at the discount price that the organization may have received. For example, if the event includes dinner, wine, and entertainment and costs the organization \$85 to hold, and if the ticket price is \$125, then the guest's tax-deductible donation is not \$125 but \$45—the \$125 cost of the ticket minus the \$85 in goods received.

If a person attends several events sponsored by the same charity during the year but each event is under the \$75 threshold, the payments are not aggregated to meet the \$75 threshold. However, a donor cannot submit several small checks to cover the costs of one event with a high ticket price to circumvent this ruling. If a donor writes a check to a charity for \$100 and receives in return \$45 worth of goods or services, the \$55 would be deductible, but because the \$100 payment, or quid pro quo contribution, exceeds the \$75, the charity must provide the disclo-

sure statement even though the amount the donor can deduct does not exceed the \$75 limit. The safest way for the charity to protect itself after attempting to state the exact amount of the deduction on an invitation is to add "Tax deductible to the fullest extent as provided by law."

Any questions regarding these rules can be answered by reading the IRS publication 1771 (07-2005), a copy of which is included in Appendix 12-H. Other resources are available upon request from AFP, ASAE, and Independent Sector.

REFERENCES

- Collins, M.E. Save the date: How to ensure a special fundraising event is right for your organization. *Advancing Philanthropy* (July/August 2007): 22–27.

Case Study: How to Involve the Younger Generation in Special Events: Reaching the New Kids on the (Philanthropic) Block

If you want to learn how to develop the younger generation's version of the golf and gala, go straight to the source.

"Many organizations are developing leadership committees or 'junior boards' that plan events like fashion shows and concerts," says Bridget Baughn, senior director of event services for Changing Our World Inc. in New York (<http://www.changingourworld.com>). "Some of them have been pleasantly surprised that these groups are raising a lot of money and getting exposure for the organization in a group where they hadn't had it before."

Jessica Stannard-Friel, co-editor of the blog Future Leaders in Philanthropy, which is a project of on-Philanthropy (<http://flip.onphilanthropy.com>), says that young people are price-sensitive and suggest planning events around the kinds of activities that the group already enjoys doing, such as cocktail parties, networking, and playing sports. She also points out an interesting "cart before the horse" trend in this demographic.

"This is the generation that grew up with walk-a-thons and read-a-thons, selling wrapping paper in school, and doing sorority and fraternity fundraisers in college," she says. "Now, a group will decide to do a fundraising event and *then* look for a charity to affiliate with instead of being involved with the organization first."

The Washington, D.C., group SMASHED (<http://www.dcsmashed.org>) is a perfect example. The Society of Mature Adults Seeking to Help, Entertain, and Donate dreams up wacky

events and parties, charges people less than \$20 to participate and gives local charities the money it collects. This year's D.C. "Idiotarod," in which costume-clad participants raced grocery carts instead of dog sleds through the streets, raised \$4,000 for the Arlington Food Assistance Center. Other SMASHED events have included a Sweet 'Stache ManPageant and an Amazing Race-style scavenger hunt.

Although there seems to be no end to the level of zaniness they enjoy, SMASHED does have some guidelines: it chooses local charities with operating budgets under \$5 million, where it feels its donations will have the greatest impact, and it requires the benefiting charity to be present at the event.

"It's not just about raising money," says Ellen Shortill, founder of SMASHED. "It's also about awareness. Last year we did one event that didn't raise that much money, but about 100 people who took part then signed up to participate in the charity's own fundraising walk later on."

For organizations that want to cultivate their up-and-coming generation of donors, Shortill has a few tips. "Accept the value of small donations and value the input of silly ideas," she suggests. "People have serious lives and they look for ways to relax and blow off steam. Create amusing opportunities for friendly interaction. You can raise money wearing black tie, or you can do it in a pirate outfit."

The bottom line? As Shortill says, "Silliness wins."

Source: Courtesy of the Association of Fundraising Professionals (AFP), *Advancing Philanthropy*, July/August 2007, p. 24, Arlington, Virginia.

Sample Save the Date Card

Save the Date!

Tables are being painted right now...silent auctions items are being gathered...so mark your calendar and look for your invitation later in the summer!

THE HICKMAN'S
THE ART OF Caring
2006

FRIDAY EVENING • OCTOBER 13 • 6:30 PM

2006 ARTISTS
Cori Cross • Anne Burnet Hidell • Susan Gordon
Kathy Johnston • David Knoecklein • David Linton
Matiko Mamaladze • Don Pywell • Ann Rae • Linda Saboe
Don Shoffner • Nancy Thompson • Betsy Zukin

THE HICKMAN'S
THE ART OF Caring

Chat with friends and neighbors at The Hickman while enjoying an autumn evening of delicious food and an auction...with a twist! The capstone of the evening will be an exciting live auction, sponsored by First National Bank of Chester County, featuring thirteen "Tilt Top Tables" each painted and interpreted by a collected area artist. Beforehand, browse more than sixty enticing silent auction items, packages and unique experiences.

2006 SPONSORS

ARTIST UNDERWRITERS: Peg Anderson & Kathy Head • ACAC Fitness & Wellness • Cannon Hill Farm • 1st National Bank of Chester County • Gavthrop Greenwood • Sue Hartz, Robbe Healey & John Schwab • In Memory of Henry R. Hidell, Jr., by his family • The Hickman Board of Managers • Jane H. Mack, Elizabeth Macy Stratton, Charles Mack & Jane Stratton Mack • National Penn Bank

PRESENTING FRIENDS / PRINTING SPONSOR: Alliance Print Group

OTHER SPONSORS: Krott Capital • Springsteen Hotaling Group at Morgan Stanley
(List Incomplete)

The official registration and financial information of The Hickman may be obtained from the Pennsylvania Department of State by calling toll free, within Pennsylvania, 1-800-732-0999. Registration does not imply endorsement.

To view the tables, read about our artists, sponsors and silent auction items please visit www.theartofcaring.org

THE HICKMAN
400 North Walnut Street
West Chester, PA 19380

Non-Profit Org.
U.S. Postage
PAID
West Chester, PA
19380
Permi. No. 108

Source: Courtesy of Robbe Healey, MBA, ACFRE, Senior Development Director, The Hickman, West Chester, Pennsylvania.

Example of an Event Planned Around a Holiday Theme

The Animal Welfare League
 of Alexandria

presents our 3rd annual
Black Tie & Tails Gala
 with Leadership Support from
Your Dog's Best Friends

Saturday, February 10th, 2007
 Holiday Inn Hotel & Suites (625 First Street Alexandria, VA)
 7:30 pm to 11:00 pm

Join us for an elegant affair with the ones you love. We have planned a unique Valentine's celebration for you and your dog featuring a canine couture fashion show hosted by Carlos Mejias of Olde Towne School for Dogs, a live auction, gourmet dog buffet, signature doggie "cocktails", music by Charlene Cochran & the Fifth Avenue Band, dancing, tempting hors d'oeuvres and desserts and more!



Our thanks to our wonderful sponsors:
 Alexandria Animal Hospital
 Mrs. James McIlhenny
 Belle Haven Animal Medical Centre
 Regional Veterinary Referral Center
 Crosspointe, Fort Hunt & Hayfield Animal Hospitals

RSVP by February 2, 2007
Black Tie optional or Elegant Period Dress
(to celebrate our 60 years — 1946 - 2006)

*come dressed in black tie (optional) or elegant period attire from your favorite decade
 the forties the 50's the sixties the 70's the eighties the 90's today*

Source: Courtesy of the Animal Welfare League of Alexandria, Virginia.



*The 3rd Annual
Black Tie
& Tails Gala*

a valentine for you and your dog



Animal Welfare League of Alexandria
4101 Eisenhower Ave., Alexandria, VA 22304

The Animal Welfare League of Alexandria is a non-profit 501(c)(3) organization which offers adoption and humane education services, and helps homeless, injured, and abandoned animals. We are contracted to operate the City of Alexandria Vola Lawson Animal Shelter and provide animal control services to City residents.



spend a special evening with your sweetheart to help us celebrate 60 years of caring

Samples of Materials Used with Event Invitations

- A. **Invitation** (Fulbright Lifetime Achievement Medal Dinner)
- B. **Admission Tickets** (Fulbright Medal Dinner and Dalai Lama)
- C. **Menu Card** (Fulbright Medal Dinner)
- D. **Press Pass** (Faith & Politics Institute’s 15th Anniversary Celebration)
- E. **Reply Envelope** (Animal Welfare League of Alexandria)
- F. **Reply Cards** (Animal Welfare League of Alexandria and the 31st annual Hutch Holiday Gala)
- G. **Table Reservation Card** (Fred Hutchinson Cancer Research Center) Faith and Politics Institute 15th Anniversary Celebration)
- H. **Table Seating Card** (Faith and Politics Institute’s 15th Anniversary Celebration)
- I. **Invitation to Pre-Event Reception** (OPAL—ASCE)

A. Invitation

Fulbright
ASSOCIATION

FULBRIGHT
LIFETIME ACHIEVEMENT
MEDAL DINNER
Honoring





RITA E. HAUSER
JOHN MENDELSON
HILDA OCHOA-BRILLENBOURG

Tuesday, May 17, 2005
Andrew W. Mellon Auditorium
1301 Constitution Avenue, N.W.
Washington, D.C.

THE FULBRIGHT ASSOCIATION
CORDIALLY INVITES YOU TO ATTEND THE

**FULBRIGHT LIFETIME
ACHIEVEMENT MEDAL DINNER**

honoring Fulbright alumni

**RITA E. HAUSER
JOHN MENDELSON
HILDA OCHOA-BRILLENBOURG**

TRIBUTES BY

Harvey V. Fineberg
Senator Kay Bailey Hutchison
Moisés Naím

PERFORMANCE BY

YOUTH ORCHESTRA OF THE AMERICAS STRING QUARTET
FEATURING PIANIST DAVID ROBERT COLEMAN
AND VIOLIST EDMUNDO RAMIREZ

Tuesday, May 17, 2005

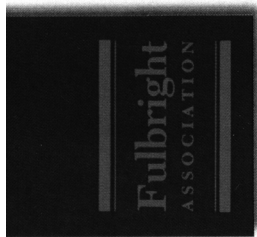
Andrew W. Mellon Auditorium
1301 Constitution Avenue, N.W.
Washington, D.C.

7:00 p.m. Cocktails
8:00 p.m. Dinner
Black Tie

RSVP BY MAY 2, 2005
REPLY CARD ENCLOSED

Source: Courtesy of Lansdale Associates, Events Consultants, Washington, DC.

B. Admission Tickets



FULBRIGHT
LIFETIME ACHIEVEMENT
MEDAL DINNER

Tuesday, May 17, 2005
7:00 p.m. Cocktails
8:00 p.m. Dinner
Black Tie

Andrew W. Mellon Auditorium
1301 Constitution Avenue, NW
Washington, D.C.

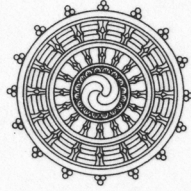
Please present ticket.

Complimentary valet parking will be available.

AN EVENING WITH THE DALAI LAMA

*2003 Human Rights Award
Ceremony & Dialogue*

*hosted by the International League
for Human Rights*



4:00 p.m. Light Refreshments
5:00 p.m. Award Ceremony and Dialogue

Friday, September 19, 2003

Asia Society and Museum
725 Park Avenue at 70th Street
New York, NY
Business attire

ADMIT ONE

Ticket required for admission

Source: Courtesy of Lansdale Associates, Events Consultants, Washington, DC.

C. Menu Card

Menu

*Arctic Char Gravlax
Spring Salad of Pea Pods, Red Lentils & English Peas*

2000 Chalk Hill Estate Bottled Chardonnay



*Medallions of Spring Lamb
with a Meyer Lemon-Pine Nut Crust
over Baby Spinach & Shallots*

New Potato Gallettes

Asparagus & Baby Spring Vegetables

2002 Hogue Cabernet-Merlot



*Poached Bartlett Pears
stuffed with Orange Mascarpone
on Hazelnut Cakes*

2004 Rockbridge V d Or

Demitasse



*Fulbright Lifetime Achievement Medal Dinner
Andrew W. Mellon Auditorium
Tuesday, May 17, 2005*

D. Press Pass

Name _____

Encouraging Reconciliation
**Deepening
INVITING CONSCIENCE**
COMPASSION Seeking Spiritual Wisdom
ENCOURAGING RECONCILIATION



THE FAITH & POLITICS INSTITUTE'S
15TH ANNIVERSARY CELEBRATION

Calling Forth HEALING OUR
NATION & OUR WORLD
Courage Encouraging Reconciliation

Building Bipartisan Community
Our World CONDUCTING HONEST
onscience CONVERSATIONS ON RACE
Compassion SEEKING SPIRITUAL WISDOM

PRESS

E. Reply Envelope

3rd Annual Black Tie & Tails

Animal Welfare League of Alexandria
4101 Eisenhower Ave.
Alexandria, VA 22304



F. Reply Card

Black Tie and Tails Gala Reply Card

_____ Please reserve _____ tickets at \$125 per person (one dog per person).
_____ I cannot attend, but please accept the enclosed donation \$ _____

Name: _____

Business: _____

Address: _____ Zip _____

Phone: _____ Email: _____

Guest name(s): _____

Dog name(s): _____

Total enclosed: \$ _____ Payment method: _____ Check (enclosed) _____ Visa/Mastercard/Discover

Card # _____ Exp. _____

Signature _____



Reservations held at the door.
Please RSVP by February 2, 2007.
Space is limited to the first 300 reservations.
Dog registry is limited to the first 100 dogs.
One-half of each ticket is tax-deductible.
For information about additional sponsorship opportunities,
contact Beverly Hoffmann at 703/838-4774 ext. 206.

Source: Courtesy of the Animal Welfare League of Alexandria, Virginia.

F. Reply Card

RSVP

^{31st} annual
HUTCH HOLIDAY GALA *Saturday, December 9, 2006*

Name _____

Address _____

City _____ State _____ Zip _____

Day phone _____ Evening phone _____

E-mail _____

Reserve your seat today by registering online at www.hutchgala.com

Please reserve _____ ticket(s) at \$500 per person

Please reserve _____ patron ticket(s) at \$1,000 per person

*Patron tickets include complimentary valet parking, complimentary delivery
(greater Seattle area) of auction purchases and recognition in the auction catalog**

Please reserve one table for 10 (\$5,000) in my name with the people whose names appear on the reverse side of this card

I am unable to attend, please accept my tax-deductible contribution of \$ _____ to support cancer research*

My gift is in honor/memory of _____

Method of Payment

My check for \$ _____ is enclosed, payable to FHCRC Foundation

Please charge my credit card \$ _____

AmEx Discover MC Visa

Account Number _____

Exp. Date (MM/YY) _____

Signature _____

So that your gift may be matched, please enclose your company's matching gift form with your donation.

The favor of your reply is requested by **November 10, 2006**. Seating is limited. Reservations will be accepted in the order they are received.

** Contributions will be recognized in the auction catalog if received by October 25, 2006.*

Source: Courtesy of the Fred Hutchinson Cancer Research Center, Seattle, Washington.

G. Table Reservation Card

L.A.S.E. VIVANTIA GOLDEN GALA
January 2013

I wish to reserve a table in my name _____
Tables accommodate 10 – 12 guests. List below the names, addresses and phone numbers of each guest for catalog mailing and bid assignments.

I will not be a host, but wish to be seated with (list below):

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

You will receive confirmation of your reservation by mail.

FRED HUTCHINSON
CANCER RESEARCH CENTER
A LIFE OF SCIENCE

Source: Courtesy of the Fred Hutchinson Cancer Research Center, Seattle, Washington.

H. Table Reservation Card

Encouraging Reconciliation
**INVITING Deepening
CONSCIENCE** Seeking Spiritual Wisdom
ENCOURAGING RECONCILIATION



THE FAITH & POLITICS INSTITUTE'S
15TH ANNIVERSARY CELEBRATION

Calling Forth HEALING OUR
NATION & OUR WORLD
Courage Encouraging Reconciliation
Building Bipartisan Community
Our World **CONDUCTING HONEST**
onscience **CONVERSATIONS ON RACE**
Compassion SEEKING SPIRITUAL WISDOM

TABLE # _____

Source: Courtesy of Lansdale Associates Events Consultants, Washington, DC.

I. Invitation to Pre-Event Reception



ÆCOM

and

Clark Construction Group, LLC

Cordially Invite You and a Guest to Attend

a Private Pre-OPAL Reception

to Honor and Meet the 2006

OPAL Lifetime Achievement Recipients

OCEA Finalists

Charles Pankow Award for Innovation Finalists

Henry Michel Award Recipient

Wednesday, April 26, 2006

5:30 pm to 6:15 pm

The Oculus

Ronald Reagan Building and International Trade Center

1300 Pennsylvania Avenue, NW

Washington, District of Columbia

Photo Identification is Required

RSVP Required by April 14, 2006

to Diane Connolly

(703) 295-6159 or dconnolly@asce.org



Source: Courtesy of American Society of Civil Engineers (ASCE), Reston, Virginia.

Checklists for an Event or Meeting

Workbook

Checklists for an event or meeting



DEFINING YOUR EVENT OR MEETING

Name of Event or Meeting _____

Purpose _____

Date(s) _____ to _____

Venue(s) ___Hotel___ Convention Space ___Restaurant(s)___Other _____

Who is invited (general type) _____

Number of people invited..... _____

Out of town _____

How many require airfare / transportation? _____

Number of sleeping rooms needed _____

Format Plenaryyes _____no _____
 Breakout sessions.....yes _____no _____
 Number of meeting rooms needed _____

Food and drink In-house cateringyes _____no _____
 Outside cateringyes _____no _____
 Restaurant dining.....yes _____no _____
 Receptionsyes _____no _____
 Details _____

Theme yes _____no _____
 If yes, description of theme

Guest speakers.....yes _____no _____

Outside staffyes _____no _____

Hired entertainmentyes _____no _____

Gifts for attendeesyes _____no _____

Audiovisual.....yes _____no _____

Printed Materials (e.g. invitations)yes _____no _____

Budget total _____

VENUE / HOTEL SITE INSPECTION:

Name of venue or hotel _____

Contact person _____

Phone number _____ ext. _____

Fax number _____

E-mail _____

Other contacts _____

Things to make sure you ask:

Adequate parking

Valetyes no _____ Cost

Selfyes no _____ Cost

Cancellation policyyes _____no _____

Deposit requiredyes _____no _____

Banquet facilitiesyes _____no _____
 if yes ask for menus

On-site catereryes _____no _____
 if yes ask for menus

Group rate for rooms.....yes _____no _____

Any construction/renovations planned during your stay
 yes _____no _____

Business services (photocopies etc.)yes _____no _____

Audiovisual servicesyes _____no _____

Results of call or visit _____

Source: Courtesy of Where Magazine, Morris Visitor Publications, Augusta, Georgia. 2007.

SAMPLE CONTRACTS

1. Here is a sample contract for booking “sleeping rooms” at a hotel for a group during an event or meeting.

GROUP EVENT AGREEMENT
BETWEEN [HOTEL NAME]
AND [BOOKER'S NAME]

BOOKED BY _____

DATE _____

ACCOUNT NAME: _____

ACCOUNT ADDRESS: _____

Telephone: _____

Fax: _____

This Group Event Agreement and the attached Appendices constitute the entire agreement between [ACCOUNT NAME] and [Hotel] regarding arrangements for the [NAME OF MEETING] to be held over the dates of [DATE ARRIVAL] - [DATE DEPART] inclusive.

In consideration of the mutual obligations of the above parties, respectively referred to as the Hotel and the Client, the parties agree as follows:

1. Guest Room Block. The Hotel agrees to hold a block of guest rooms for the Client for the Event, as set out below, on a tentative first option basis until [DATE].

_____ [NUMBER OF ROOMS]

2. Group Room Rates. Group Room Rates PER NIGHT PER ROOM shall be as follows:

_____ SINGLES

_____ DOUBLES

_____ SUITES

Options

(A) All Group Room Rates are non-commissionable and are subject to applicable occupancy and sales tax, currently 14%.

or

(B) All Group Room Rates are commissionable at 10% per room actually occupied, payable to (Agency of Record) and are subject to applicable occupancy and sales tax, currently 14% (occupancy) and 8.25% (sales). The Client agrees not to change the Agency of Record without notice to the Hotel. Commission payments will only be made to the Agency of Record after receipt in full by the Hotel of all amounts owed to the Hotel by the Client for the Event.

3. Deposit. A deposit of \$[AMOUNT] is required on or before [DATE]. In the event that the Deposit is not received by the Hotel on or prior to [DATE], all commitments shall be released. The Deposit will be deducted from the final billed amount.

4. _____ Reservation Method

Options

(A) The Client shall submit an advance rooming list (the List) to the Hotel no later than [DATE] to secure reservations. After this date, any unreserved rooms will be released by the Hotel for general sale. The Hotel will continue to accept reservations after [DATE] only on a space available basis at either A. Agreed upon Group Room Rates; B. National Corporate Rates; C. Rack Rates. The List must be complete with names, arrival/departure dates, smoking preferences and specific payment instructions. Any additions or revisions to the List, subsequent to its initial submission, should be made directly with the Hotel's Conference Services Department.

or

(B) Room reservations will be made directly with the Hotel on an individual basis. Individuals must call the Hotel directly and request the Reservations Department. It is imperative that

individuals indicate their group affiliation when making reservations, otherwise the group rate that applies may not be extended. Direct reservations must be made prior to [DATE]. After this date, any unreserved rooms will be released by the Hotel for general sale. The Hotel will continue to accept reservations after [DATE] on a space available basis at A. Agreed upon Group Room Rates; B. National Corporate Rates; C. Rack Rates.)

or

(C) The Hotel will provide (#) reservation reply forms to the Client. The Forms must be returned to the Hotel prior to [DATE] to secure availability. After this date, any unreserved rooms will be released by the Hotel for general sale. The Hotel will continue to accept reservations after [DATE] on a space available basis at A. Agreed upon Group Room Rates; B. National Corporate Rates; C. Rack Rates.

Additional Forms may be purchased for a nominal printing charge. Should you elect to utilize your own reservation form, the Hotel's Conference Services Department reserves the right to review the form, before printing.

or

(D) We understand that reservations will be made through [Local Convention & Visitors Bureau/Meeting Planner]. Reservations for this Event will not be accepted on a direct basis. Reservations must be made prior to [DATE] to secure availability. After this date, any unreserved rooms will be released by the Hotel for general sale. The Hotel will continue to accept reservations after [DATE] on a space available basis at A. Agreed Upon Group Room Rates; B. National Corporate Rates; C. Rack Rates.

All guest rooms will be held for late arrival, if guaranteed. A guarantee on each reservation may be in the form of an advance deposit for the payment of the first night's room and tax, either cash or a major card, or pre-arrangements made with the Hotel's credit department.

5. Changes to the Event. The Client will provide to the Hotel, on a timely basis, any changes to its attendance projections and guestroom and function space requirements for the Event. All changes are subject to availability, and all agreed upon changes will be confirmed by the parties in writing prior to the Event. This agreement has been negotiated based on dates, number of rooms, function space outlined in the contract, any material changes may result in changes in room rates and function space.

6. Full Cancellation of Event and Rooms Blocked. If the Client cancels the Event and Guest Room Block in its entirety, the Hotel shall have suffered damages equivalent to the lost profits that the Hotel would have made from the sales of rooms, food and beverages, incidental purchases, etc., in connection with the Event. The parties acknowledge that it is difficult to quantify such damages and instead have agreed that the Hotel shall assess a fee (The Fee) against the Client as liquidated damages and not as a penalty (such damage amount agreed to be expressed as a percentage of Rooms and food and beverage revenue lost by the Hotel as a result of the said cancellation, as reasonably determined by the Hotel). At such time, the Hotel shall assess the Fee based upon the scale below in Paragraph eight.

7. Partial Cancellation (Attrition). If the Client partially cancels the Event and/or Rooms blocked the Hotel shall have suffered damages (equivalent to the lost profits the Hotel would have made from the sale of Guest Rooms, food and beverages, incidental purchases, etc. in connection with the Event). The parties acknowledge that it is difficult to quantify such damages and instead have agreed that if the Client cancels Rooms or functions committed for the Event that in their totality exceed 10% of the Room block/function commitment as of the Option Date, the Hotel shall assess a fee against the Client as liquidated damages and not as a penalty such damages being agreed to be expressed as a percentage of Rooms and food and beverage revenue exceeding 10% lost by the Hotel as a result of the cancellations, as reasonably determined by the Hotel. At such time, the Hotel shall assess the Fee based upon the scale below in Paragraph eight.

8. _____ Fee Scale for Full and Partial Cancellations.

Number of Days Prior to the Scheduled Commencement Date of the Event Liquidated Damages, Expressed as a percentage of Lost Rooms (Option: Food and Beverage); Revenue

366 days and beyond	.15%
365-181 days	.25%
180 days-121 days	.40%
120 days-91 days	.50%
90 days-61 days	.67%
60 days-31 days	.75%
30 days or less	.90%

Notice of any cancellation must be received by the Hotel in writing, and any Fee assessed is payable by the Client no later than thirty (30) days after being invoiced therefor by the Hotel. The Deposit amount will be deducted from any cancellation Fee owed.

9. Check in/Check Out Time. Check-in time is 3:00 p.m. Room assignments prior to this time are subject to availability. Check-out time is 12:00 p.m. If any Room is vacated after this time, the Client will be charged a late charge, as reasonably determined by the Hotel, unless prior arrangements are made with Hotel's management.

10. Portage/Gratuities. Portage charges have been established at \$[AMOUNT] per bag each way. This charge shall be added to the Client's master account.

11. _____ Payment Procedure.

Options

A) Individual attendees will each be responsible for their Room, tax and incidental charges. A Group master account will be established to include function space, audio-visual, and scheduled food, beverage, reception function charges for the Event.

or

B) Attendees will be responsible for their incidental charges. A Group master account will be established to include all Guest Room, tax, function space, audio-visual, scheduled food, beverage and reception function charges for the Event.

or

C) A group master account will be established to include Group members' room, tax, incidentals, function space, audio-visual and scheduled food, beverage and reception function charges for the Event.

12. Account Settlement. A final invoice (the Invoice) of all outstanding amounts will be prepared at the close of the Event. Final payment is due immediately upon receipt of the Invoice, unless prior billing arrangements have been made with the Hotel's Credit Manager. Any Invoice outstanding for more than thirty (30) days will bear interest at the rate of [RATE]% per month (18% per annum) until paid, unless this rate exceeds the maximum rate permitted by applicable laws, in which event the maximum legal rate shall apply.

13. Damages to Hotel and Indemnity. The Client shall be responsible for all damages, including property damages and/or personal injuries suffered or incurred by the Hotel or any employee or staff member of the Hotel or other guest of the Hotel caused by the negligence or misconduct of the Client or any invitee of or outside contractor hired by the Client. The Client agrees to indemnify and hold harmless the Hotel, the Owner of the Hotel, the Operator of the Hotel, all entities affiliated with each of them and each of their respective officers, directors, employees and agents (the "Indemnities") of and from all actions, costs, claims, losses, expenses and/or damages, including reasonable attorney's fees, arising out of or resulting from the Event or the Client's use of the services and facilities of the Hotel unless the same are due to the gross negligence or willful misconduct of the Indemnities or any one or more of them.

14. Force Majeure. If for any reason beyond the Hotel's or the Client's reasonable control, including but not limited to strikes; labor disputes; acts, regulations or orders of governmental authorities; civil disorder; disasters; acts of war; acts of God; fires; flood or other emergency conditions; any delay in necessary and essential repairs of the Hotel; the Hotel or the Client is unable to perform its obligations under this Agreement, such non-performance is excused and such party may terminate this Agreement without further liability of any nature, upon return of the Client's deposit. In no event shall the Hotel or Client be liable for consequential damages of any nature for any reason whatsoever.

15. Insurance. Client and Hotel agree to obtain and maintain throughout the term of the Event, insurance of such types and in such amounts as a reasonably prudent company in their respective industries would obtain and, upon request, each agrees to provide the other with evidence of such insurance.

16. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the State where the Hotel is located.

17. Notices. All notices required or provided for under this Agreement shall be in writing and shall be effective immediately upon receipt by personal delivery, facsimile transmission or registered mail, return receipt requested, addressed to the other party's attention.

18. Non-Waiver of Breach. The Hotel's failure to demand strict and full performance of any of the covenants or agreements on the part of the Client to be observed, kept or performed, while the Client is in default with respect to any such covenant or agreement, shall not be construed to be a waiver by the Hotel of any such default or breach of covenant.

19. Authority to Sign. If this Agreement is signed in the name of a corporation, partnership, association, club or society, the person(s) signing represents and warrants to the Hotel that he/she has full authority to sign such contract and that in the event he/she is not so authorized, he/she will be personally liable for the faithful performance of this contract.

20. Entire Agreement. This Agreement contains all of the understandings between the parties and may only be modified in writing signed by both parties.

21. Option Date. The block of guest Rooms and function space and services referred to in this Agreement shall be released automatically by the Hotel without notice to the Client, unless a fully executed copy of this Agreement [and] the requisite deposit have been received by the Hotel on or before [DATE]. In the event that another organization requests the same or similar arrangements on a definite basis on or prior to the Option Date, and the Hotel cannot handle both functions, the Client will be given written notice of such matter and be given seventy-two (72) hours in which to submit an executed copy of this Agreement [and] the requisite deposit to confirm the Commitment on a definite basis or space will be released.

IN WITNESS WHEREOF the parties hereto have caused this Agreement to be executed as of the _____ day of _____ 199_____.

("Hotel")

Per: _____

[NAME] [TITLE]

Date _____

("Client")

Per: _____

[NAME] [TITLE]

Date _____

APPENDIX:

AMERICANS WITH DISABILITIES ACT

1. HOTEL'S RESPONSIBILITIES. [HOTEL] shall be fully responsible for compliance with the Americans with Disabilities Act of 1990, as it may be amended, and all the rules and regulations promulgated under it (the "ADA") with respect to:

- a) the [HOTEL'S] policies, practices, procedures and eligibility requirements;
- b) the provision of auxiliary aids and services in the Hotel, except;
- i) in areas designated for the exclusive use or within the control of the Client or other third parties exclusively using areas of the Hotel including, without limitation, tenants, licensees and other groups (collectively "Third Party Users"); and
- ii) aids and services required for the specific activities of the Client or other Third Party Users;
- c) architectural, communications and transportation barriers in the Hotel, except barriers created by or within the control of the Client; and
- d) the availability of wheelchair seating spaces in assembly areas, except to the extent that the Client exercises control or direction over the arrangement of seating in an assembly area.

2. CLIENT'S RESPONSIBILITIES. The Client shall be fully responsible for compliance with the ADA with respect to:

- a) the policies, practices, procedures and eligibility criteria employed by:
 - i) the Client; and
 - ii) any person(s) other than the Hotel providing goods or services in connection with the Client's use of or activities at the Hotel;
- b) the provision of auxiliary aids and services:
 - i) in areas designated for the exclusive use or within the control of the Client, and
 - ii) required for the specific activities of the Client (as distinct from the activities of non-Client guests of the Hotel);
- c) architectural, communication and transportation barriers created by or within the control of the Client; and
- d) any violation of wheelchair seating requirements, to the extent that the Client exercises control or direction over the arrangement of seating in an assembly area.

3. REQUIREMENTS OF THE GROUP. The parties acknowledge that the Hotel's capacity and obligation (under the ADA and paragraph 1 above) to provide auxiliary aids and services and guest Rooms accessible to or otherwise equipped for the benefit of disabled persons are limited in number and kind. The Client, therefore, shall notify the Hotel reasonably prior to the Event, of the number and type of such aids and services or Rooms required by Client members. The Hotel, in turn, promptly will notify the Client of the extent to which such needs exceed the Hotel's ADA obligations and capacity. The Client shall bear the responsibility to provide any aids or services or alternative lodging in excess of the Hotel's ADA obligation and capacity.

4. INDEMNIFICATION. The Hotel and the Client each agree to indemnify, defend, reimburse and hold the other harmless from and against any and all claims, liabilities, damages, penalties, costs (including reasonable attorney's fees and costs), losses and expenses incurred based upon the failure of the indemnifying party to comply with the ADA with respect to matters for which it bears responsibility under the preceding paragraphs.

GROUP EVENT AGREEMENT

2. The following contract is for an event (in this case a dinner and reception) at a hotel. The covering letter also suggested a range of outside caterers who would be able to provide the food service.

BETWEEN _____
 AND [HOTEL] _____
 [BOOKER'S NAME] _____
 BOOKED BY _____
 DATE _____
 ACCOUNT NAME: _____
 ACCOUNT ADDRESS: _____
 Telephone: _____
 Fax: _____
 DAY: _____
 TIME: _____
 EVENT: _____ Reception and dinner
 # OF GUESTS: _____
 ROOM: _____

All reservations for private banquet functions are made upon and subject to the rules and regulations of the [Hotel] and are subject to the following conditions:

1. The menu and all other details of your event(s) are to be finalized a minimum of 3 weeks prior to the date of your event(s) and are subject to the terms and conditions described herein.
2. A deposit in the amount of is required to reserve the above space and will be credited toward the total cost of your event(s). However, this deposit may not be refunded in the event you cancel all or part of your function. Please see paragraph 11 below.
3. For corporations and associations only, direct billing may be requested. The credit application must be completed by the Client and returned, fully completed, to the Hotel with this application. If approved, you will be billed directly with the terms of payment noted on your account. Credit restrictions apply and are not available on all functions.
4. For social or personal events, the estimated outstanding balance is due and payable 8 working days in advance of the function if paying by approved personal check or 48 hours in advance of the function if paying by cash, approved certified or cashiers check or bank draft. A final account will be remitted at the completion of your event and is payable upon receipt.
5. An 19% service charge and an 8.25% sales tax will be added to all food and beverage charges.
6. All details of the food and beverages to be served shall be set forth on a separate menu and arrangements proposal (Event Order) which is made a part hereof.
7. The guaranteed number of attendees must be communicated to the Catering Office at the Hotel not less than 2 full working days (Monday through Friday, excluding holidays), prior to the function. A 5% allowance in food preparation over the guaranteed number will be given on all events. Final charges will be based on the guaranteed number of attendees (or number of persons for which the event was originally booked, if no guaranteed number is provided) or the total number served, whichever is greater.
8. The room(s) designated for your event(s) carries a minimum and a maximum attendance number. If your final guaranteed number is lower or higher than these numbers, the Hotel reserves the right to transfer your party to another function room and/or charge a rental (or additional rental) to you based on the established Hotel rental schedule.
9. A minimum of 14 persons is required for all food functions. A labor charge of \$85.00 will be charged to you should the attendance be less than this minimum. The Hotel reserves the right to charge a service fee for set-up of rooms with extraordinary requirements.
10. No changes to the menu may be made by the Client within the five day period preceding your event.
11. Cancellation Policy: Your advance deposit will not be refunded in the event you cancel your event with the Hotel. In addition, a cancellation fee may be charged to you and payable upon demand in the event of cancellation of all or part of your program after acceptance of this booking by the Hotel. The fee will be based on banquet pricing in effect at the time notification of cancellation is received by the Hotel. These amounts are due as liquidated damages and not as a penalty. The following schedule will apply:

0-30 days.....	100%
30-60 days.....	50%
60-90 days.....	25%
12. All displays, exhibits and decorations must conform to the city's Building Code and Fire Ordinances and should be free standing without attachment to walls, ceilings or floors. Decorations or centerpieces incorporating candles or any device emitting a flame must be approved by and have a valid permit from the City Fire Department in order to be used for a

given function. This signed permit must be issued for the specific event, and be on file in the hotel's security office prior to the start of the function. If a permit is not obtained, the hotel reserves the right to remove or alter the centerpieces in order to comply with the fire code.

13. The Client shall be responsible for any damages (including property damages and/or personal injuries) suffered or incurred by the Hotel or any employee or staff member of the Hotel arising out of or resulting from the acts or omissions of the Client or any guest of or outside contracted hired by the Client with respect to the Event. The Client further agrees to indemnify and hold harmless the Hotel, the manager of the Hotel, any entities affiliated therewith and their officers, directors and employees (the "Indemnitites") from all actions, costs, claims, losses, expenses and/or damages, including attorney's fees, arising out of or resulting from the Client's use of the services and facilities of the Hotel unless the same are due to the negligence or willful misconduct of the Indemnitites or any one or more of them.
14. All displays, exhibits, decorations, equipment and musicians must enter and exit the Hotel through the receiving entrance and/or security office. Delivery and pick-up times must be coordinated with the Hotel in advance.
15. All musicians, entertainers contracted by the Client must be approved by the [Hotel]. Amplified music or amplified singing is not allowed in the [following rooms].
16. No food or beverages of any kind may be brought into the Hotel by the Client without the written permission of the Hotel and are subject to such service and/or labor charges as are deemed necessary by the Hotel.
- 17-20 [These paragraphs deal with the ADA, and are similar to those in the sleeping room contract, above.]
21. If for any reason beyond its control, including but not limited to strike, labor dispute, accident, act of war, act of God, fire, flood or other emergency condition, the Hotel is unable to perform its obligations under this Agreement, such non-performance is excused and the Hotel may terminate the Agreement without further liability of any nature, upon return of the Client's deposit. In no event shall the Hotel be liable for consequential damages of any nature for any reason whatsoever.
22. Overdue accounts shall bear interest at the rate of 1 1/2% per month (18% per annum) until paid unless such rate exceeds the maximum rate allowed by the applicable laws in which the event the maximum legal rate shall apply.
23. The Hotel reserves the right to inspect and control all private functions. The Hotel cannot assume liability for any personal property or equipment of Client or Client's guests or invitees brought to the Hotel.

Please sign and return both applications along with the requested deposit. If the applications and deposit are not returned to the Hotel by [DATE] the Hotel shall be released from this commitment and free to re-book this space with another Client.

If this agreement is signed in the name of a corporation, partnership, association, club or society, the person signing represents and warrants to the Hotel that he/she has full authority to sign such contract, and in the event he/she is not so authorized, that he/she will be personally liable for the faithful performance of this contract.

Signature by the Hotel shall be regarded as acceptance by the Hotel of the above reservation for the Client's function.

SIGNATURES _____

3. The following, much simpler contract is an example of what a major restaurant might expect.

ACCEPTANCE OF TERMS
 The undersigned acknowledges that I have read and understood the [Name of Restaurant] Banquet Information Sheet. I have also read and agree with the arranged information and terms. I understand that the final guest count is due 72 hours prior to any function, and that if no final count is given at that time the last updated guest count will apply, [Restaurant] reserves the right to relocate your group to a more suitable location should the expected attendance change significantly. We also reserve the right to make appropriate substitutions should certain food items or wines not be available. Payment is due on the day of the event, and a signed contract with a deposit is considered a confirmed reservation.

NAME OF CLIENT _____
 SIGNATURE _____
 NAME OF FUNCTION: _____
 DATE OF FUNCTION _____
 CREDIT CARD TYPE _____
 NAME ON CARD _____
 CARD NUMBER _____
 I hereby authorize [Name of Restaurant] to charge the above card number in the amount of \$ and agree to perform the obligations set forth in the Cardholder's Agreement.

SIGNATURE _____
 DATE _____

CHECKLISTS

A CATERING / BANQUET CHECKLIST

	COMPLETED	DATE
Get estimates/proposals	<input type="checkbox"/>	____/____/____
Set up tastings	<input type="checkbox"/>	____/____/____
Choose caterer	<input type="checkbox"/>	____/____/____
Choose menus	<input type="checkbox"/>	____/____/____
Choose format (formal dinner, reception, informal lunch, etc.)	<input type="checkbox"/>	____/____/____
Contract signed	<input type="checkbox"/>	____/____/____
Deposit paid	<input type="checkbox"/>	____/____/____
Amount		
Finalize menus	<input type="checkbox"/>	____/____/____
Discuss special needs (vegetarian, low-fat diets etc.)	<input type="checkbox"/>	____/____/____
Head count	<input type="checkbox"/>	____/____/____
Confirm menus, seating etc.	<input type="checkbox"/>	____/____/____
Settle payment method	<input type="checkbox"/>	____/____/____

A RESTAURANT CHECKLIST

Get estimates/proposals	<input type="checkbox"/>	____/____/____
Choose menus/beverages	<input type="checkbox"/>	____/____/____
Set up tastings	<input type="checkbox"/>	____/____/____
Choose restaurant	<input type="checkbox"/>	____/____/____
Confirm menus, seating etc	<input type="checkbox"/>	____/____/____
Settle payment method	<input type="checkbox"/>	____/____/____
Tell staff who will be paying	<input type="checkbox"/>	____/____/____
Put down a deposit	<input type="checkbox"/>	____/____/____
Tips and taxes	<input type="checkbox"/>	____/____/____
Arrange transportation for guests	<input type="checkbox"/>	____/____/____
Arrange parking for guests (self/valet)	<input type="checkbox"/>	____/____/____
Wheelchair accessibility		
yes <input type="checkbox"/>	no <input type="checkbox"/>	
Is smoking allowed?		
yes <input type="checkbox"/>	no <input type="checkbox"/>	
Will you have your own space, or will you share the restaurant with other patrons?		
yes <input type="checkbox"/>	no <input type="checkbox"/>	

HOTEL CHECKLIST

Rooms blocked	<input type="checkbox"/>	____/____/____
Rooming list complete	<input type="checkbox"/>	____/____/____
Verify check-in requirements	<input type="checkbox"/>	____/____/____
Confirm rates	<input type="checkbox"/>	____/____/____
Contracts signed	<input type="checkbox"/>	____/____/____
Check amenities	<input type="checkbox"/>	____/____/____
Hotel shuttle available	<input type="checkbox"/>	____/____/____

EQUIPMENT CHECKLIST

Check materials and decorations	<input type="checkbox"/>	____/____/____
Check technology/audio/visual requirements	<input type="checkbox"/>	____/____/____
Check lighting/temperature	<input type="checkbox"/>	____/____/____
Complete your Planner's Tool Kit	<input type="checkbox"/>	____/____/____

MISCELLANEOUS

	COMPLETED	DATE
Service personnel (e.g. concierge)	<input type="checkbox"/>	____/____/____
Parking and parking attendants	<input type="checkbox"/>	____/____/____
Security staff	<input type="checkbox"/>	____/____/____
Restroom staff	<input type="checkbox"/>	____/____/____
Taxes and gratuities rate check	<input type="checkbox"/>	____/____/____

ENTERTAINMENT AND GUEST SPEAKERS

AN ENTERTAINMENT CHECKLIST

Are speakers booked? _____	Done <input type="checkbox"/>
Contracts and fees negotiated and signed? _____	Done <input type="checkbox"/>
Check contingency clauses for bad weather or power outage. ____	Done <input type="checkbox"/>
Will your venue accommodate your entertainment choice? ____	Done <input type="checkbox"/>
Transportation needs met? _____	Done <input type="checkbox"/>
Equipment needs discussed and finalized? _____	Done <input type="checkbox"/>
View demo tapes or live performance? _____	Done <input type="checkbox"/>
Finalize accommodations _____	Done <input type="checkbox"/>
Check sound levels _____	Done <input type="checkbox"/>
Get something to fill in when the band takes a break (taped music, a DJ) _____	Done <input type="checkbox"/>
Check sight lines to and from stage _____	Done <input type="checkbox"/>

A PRESENTER'S A.V. CHECKLIST

Presenter's name: _____

Address: _____

City: State: ZIP: _____

Phone: _____ Fax: _____

Presentation title: _____

Presentation date: _____ Presentation time: _____

Do you require a lectern?yes no

Do you require a microphone?yes no

If yes, what type?lavaliere podium

Do you need an overhead projector?yes no

Do you require an LCD panel?.....yes no

Do you require a slide projector?yes no

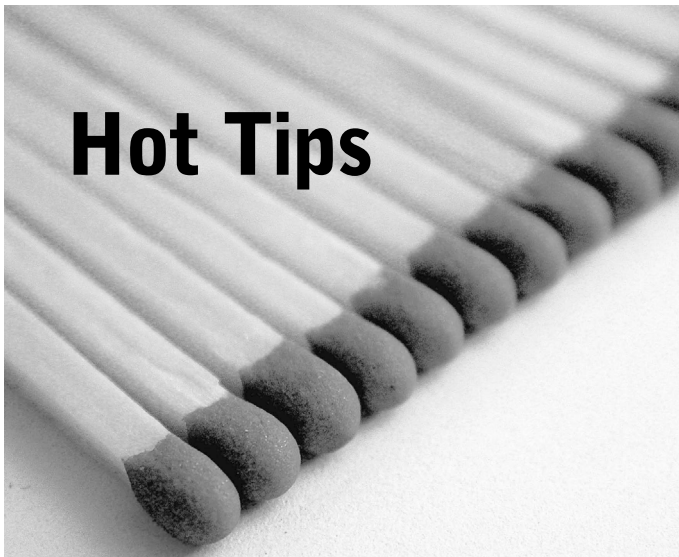
Do you need a slide tray?.....yes no

Video playback equipment?yes no

If yes, what format?yes no

 VHS 3/4 inch Betacam

Other: _____



Hot Tips

AIRPORT DIAGRAMS

Strange airports can be confusing, and confusion is time-consuming. Help your people through by offering plenty of diagrams and as much information as possible in your welcome kits. "You need to tell people to go down to the baggage claim area and look for a person in a pink shirt who will escort you to awaiting transportation," says Nancy Teper of Caribiner International, a New York Communications firm. Then, at the convention center, post more diagrams so your attendees don't waste any time getting lost.

KEEP DELEGATES IN THE LOOP

The more you can tell attendees the better. "People just want to know what's expected," says Teper. If there are out-of-town guests coming, warn them about the weather. If there are outdoor events planned, tell them to bring warm clothes and comfortable shoes.

A PRESENTER'S CHECKLIST

Professional or experienced speakers, of course, don't need checklists of how to do their job. All they need are some answers to a few basic questions, and to provide you with some basic information. Here are some things you should clarify:

- Confirm flight arrangements _____ Done
 - Confirm transportation needs _____ Done
 - Confirm AV requirements (see AV Checklist, page 85) _____ Done
 - Review schedule you have set, and Q&A policies. _____ Done
 - Inform speaker of rehearsal schedule _____ Done
- Is there a "speaker room" (a green room) where speakers can wait prior to their appearance? _____ Done

On the other hand, amateurs and first-timers, who can often be nervous and forgetful, need more help. Here's a list of pretty basic questions beginner speakers should ask themselves before presenting a paper, making a speech or leading a seminar. Even some amateurs will be insulted by this, but don't be troubled by that. It's worth it:

- In a single sentence, what's the point of my presentation? What do I want to accomplish? How much do they already know? What do I want them to know? _____
- _____
- How long have I got? _____
- Will there be Q&As afterwards, and how much time should I allot?
 yes no Minutes: _____
- Will someone alert me if I'm running over? If so, who?

- What do I do if I finish early? _____
- _____

- Am I going to ad-lib, or do I need a script?
 If script, is it ready?yes no
- If ad-libbing, do I have rough notes on notecards in case my mind blanks?yes no
- Do I have handouts?yes no
- If yes, are they ready?yes no
- Who will distribute them?yes no
- Are technical people available to help me out?yes no
- If yes, how do I reach them? _____
- Will I use overheads?yes no
- Are my overhead transparencies ready?yes no
- Are they in order?yes no
- Will I use a slide projector?yes no
- Are the slides in order?yes no
- Do I know where the first slide is?yes no
- Do I know how to use a slide projector?yes no
- Do I have something I can use as a pointer?yes no
- Do I know where the light switches are, how they work, and who will dim lights on cue?yes no
- Can I test the sound level ahead of time?yes no
- Will I need a mike?yes no
- If I'm using my computer, have I done run-throughs of the presentation?yes no
- Are the venue's electronic devices and connectors compatible with mine?yes no
- Can I field test the equipment ahead of time?yes no
- If all this fails, can I do the presentation verbally?yes no
- Is there water handy?yes no

TAKING CARE OF SPEAKERS

Make sure you find out what equipment your speakers need, what they will bring with them, and what you will need to provide. Ask about computer compatibility (both hardware and software).

BADGES AND NAME TAGS

Try not to place a ton of information on badges. Keep them simple with big, legible letters. You don't need the person's company and city. Their name and title is often perfectly adequate. Opt for badges that clip to a suit jacket, not the ones with safety pins. Or provide chains for hanging badges around the neck.

See if you can find a cheap laminator to neaten up badges and name tags

SIGNAGE THAT WORKS

Focus on legibility over cool graphics. Use velcro arrows to help point attendees to the right

place for meals, special breakout sessions and the message center. Avoid being cutesy at all costs. In addition, create meeting logo graphics for the podium and stage as well as signs for the airport pick-up spots and hospitality desk.

PERSONALIZE THE MEAL

A restaurant might be persuaded, for instance, to make a stencil of your logo so your company name appears in chocolate on the desserts.

CASH ON HAND

You will need cash for tips, cabs, etc., and for those occasions when credit cards won't be accepted. Who will handle the cash? How much do you need? Where will it be kept?

CREDIT CARDS

Make sure you have a credit card with the right limits on it. Arrange with venues (especially restaurants) ahead of time to discuss

what cards will be accepted. Who will be getting the restaurant bill? Let the staff know ahead of time.

WHAT ABOUT SPOUSES?

If there are events for spouses, tell everyone clearly what they are – and what they aren't. One good rule of thumb on this topic: Don't hold a meeting at a exquisite resort and expect attendees to want to leave spouses behind. If you're choosing a romantic location that will be pleasant for those who want to extend their business trip into a vacation once the meeting is over, you can't tell spouses not to come.

DAILY NEWSLETTERS

If your meeting lasts several days, you might consider putting out a simple daily newsletter with the highlights of the previous day's sessions. This is particularly useful if there are a lot of breakout sessions.

A TYPICAL BUDGET

Here are some typical line items in a function planner's budget.

Not all will be applicable to all meetings or events.

	Budgeted cost	Actual cost		Budgeted cost	Actual cost
VENUE:			PRINTING AND MATERIALS:		
Meeting or event space rental	\$ _____	\$ _____	Meeting kit production and printing costs	\$ _____	\$ _____
Room setup costs	_____	_____	Shipping costs	_____	_____
Equipment rental and setups	_____	_____	Agendas	_____	_____
Taxes and gratuities	_____	_____	Signage	_____	_____
			Name tags	_____	_____
TRANSPORTATION:			Notepads and pens/pencils	_____	_____
Airfare	_____	_____	Invitations	_____	_____
Taxis or limos from airport	_____	_____			
Parking	_____	_____	SPECIAL SERVICES:		
Valet parking gratuities	_____	_____	Photographer	_____	_____
Transportation to and from various venues	_____	_____	Photo developing and printing	_____	_____
			Entertainment and speakers fees	_____	_____
ACCOMMODATION:			Corporate gifts	_____	_____
Sleeping rooms	_____	_____	Shipping	_____	_____
State accommodation taxes	_____	_____	Florals and decorations	_____	_____
Necessary gratuities	_____	_____	Contingencies	_____	_____
Hospitality suite	_____	_____			
Incidentals	_____	_____	AV COSTS:		
			Computer rentals	_____	_____
FOOD AND BEVERAGES:			AV equipment	_____	_____
Per person food costs	_____	_____	Setup costs	_____	_____
Wine and spirits costs	_____	_____	Gratuities	_____	_____
Break costs	_____	_____			
Taxes and gratuities	_____	_____	STAFFING:		
Transportation and setup costs (for off-site caterers)	_____	_____	Temporary help	_____	_____
Cleanup costs	_____	_____	Security costs	_____	_____
Staff costs	_____	_____	Gratuities	_____	_____
			TOTALS	\$ _____	\$ _____

A SAMPLE TIMETABLE

Here is a typical timetable for a business meeting that will involve more than 50 people. This can easily be scaled back for smaller meetings, or for other events such as awards ceremonies, holiday parties, company picnics, etc.

FOUR TO SIX MONTHS AHEAD:

	TARGET DATE	COMPLETION DATE
Confirm # of attendees	___ ___ ___	___ ___ ___
Set budget	___ ___ ___	___ ___ ___
Site inspections	___ ___ ___	___ ___ ___
Book venue	___ ___ ___	___ ___ ___
Book entertainment	___ ___ ___	___ ___ ___
Book keynote speakers	___ ___ ___	___ ___ ___
Set preliminary agenda	___ ___ ___	___ ___ ___
Start collecting phone numbers, e-mails and addresses of participants	___ ___ ___	___ ___ ___
Decide on theme	___ ___ ___	___ ___ ___
Hire a photographer	___ ___ ___	___ ___ ___

TWO TO THREE MONTHS AHEAD:

	TARGET DATE	COMPLETION DATE
Put together the meeting or event package (the announcement with registration form, the agenda, the venue and other information that participants will need)	___ ___ ___	___ ___ ___
Send out invitations and/or registration package	___ ___ ___	___ ___ ___
Confirm speakers and panelists	___ ___ ___	___ ___ ___
Contact caterers	___ ___ ___	___ ___ ___
Contact wine & spirits suppliers	___ ___ ___	___ ___ ___
Contact florists	___ ___ ___	___ ___ ___
Confirm AV requirements	___ ___ ___	___ ___ ___
Contact AV and computer specialists	___ ___ ___	___ ___ ___
Order the corporate gifts, or other giveaways	___ ___ ___	___ ___ ___

ONE TO TWO MONTHS AHEAD:

	TARGET DATE	COMPLETION DATE
Make sure all contracts are signed	___ ___ ___	___ ___ ___
Review with legal counsel	___ ___ ___	___ ___ ___
Review speakers' assignments	___ ___ ___	___ ___ ___
Review all menus, room setups etc.	___ ___ ___	___ ___ ___
Review equipment list with participants	___ ___ ___	___ ___ ___
Start assembling ideas for the registration kits (badges, agendas, vouchers, timetables, leisure activity suggestions)	___ ___ ___	___ ___ ___
Put a copy of WHERE magazine in each kit	___ ___ ___	___ ___ ___
Finalize all menus	___ ___ ___	___ ___ ___
Finalize decor and floral arrangements	___ ___ ___	___ ___ ___

ONE MONTH AHEAD:

	TARGET DATE	COMPLETION DATE
Rehearse format with the venue, and decide on room setups, podiums, etc.	___ ___ ___	___ ___ ___

	TARGET DATE	COMPLETION DATE
Make sure enough electrical outlets are available, as well as the necessary cabling for equipment	___ ___ ___	___ ___ ___
If you're using a hotel, decide with hotel management what welcome basket will be in each room, if any	___ ___ ___	___ ___ ___
Alert hotel who your VIPs are	___ ___ ___	___ ___ ___
Confirm guest list	___ ___ ___	___ ___ ___

TEN DAYS AHEAD:

	TARGET DATE	COMPLETION DATE
Do a checklist one more time to make sure nothing has slipped through the cracks	___ ___ ___	___ ___ ___
One more time, do an accurate guest list	___ ___ ___	___ ___ ___
Prepare seating charts	___ ___ ___	___ ___ ___

THREE DAYS AHEAD

	TARGET DATE	COMPLETION DATE
Prepare name tags and badges	___ ___ ___	___ ___ ___
Guarantee banquet orders	___ ___ ___	___ ___ ___
Confirm all special services (e.g. florals)	___ ___ ___	___ ___ ___
Assemble Planner's Tool Kit	___ ___ ___	___ ___ ___

THE DAY BEFORE:

Go over your checklist againDone	Done
Arrange cash for gratuities, etc.Done	Done
Review duties with staff members or hired helpDone	Done
Make sure signage and directions are completedDone	Done
Prepare one-sheet "hot list" of critical phone numbersDone	Done
Confirm any outside vendors (e.g. AV specialist)Done	Done
Assemble all delegate materialsDone	Done

ON THE DAY:

Bring your checklists and this publication's Workbook with you.Done	Done
Bring your Planner's Tool KitDone	Done
Bring your contact "hot list"Done	Done
Have the attendee list, properly alphabetized, ready at the reception table, together with name tagsDone	Done
Bring extra name tagsDone	Done
Finalize head count for every eventDone	Done
Set out table numbers and name tags according to your seating chartsDone	Done
Solicit business cards from on-site staff, including cell phone numbersDone	Done

AFTERWARDS:

Pay the bills.....Done	Done
Write thank-yous and send giftsDone	Done
Complete your expenditures and match to budgetDone	Done
Pay gratuitiesDone	Done

Sample of a Postcard Used as an Event Invitation

A. Front of postcard invitation promotes the featured event



Source: Courtesy of the Illinois State Society of Washington, DC.

B. Reverse of postcard invitation is used to promote future events

UPCOMING ISS EVENTS – WINTER/SPRING 2006

March 25	Abraham Lincoln Institute Symposium National Archives, 8601 Adelphi Road, College Park, MD 9:00 a.m. to 5:00 p.m. For information and required registration visit: http://www.lincoln-institute.org/sym2006
Sunday, April 2	Opening of Cherry Blossom Festival with Lantern Lighting The National Mall—Tidal Basin at the Japanese Lantern 2:30 p.m.—No Charge for this Event
Wednesday, April 5	ISS Cherry Blossom Princess Reception B-354 Room—Rayburn House Office Building 6:30 p.m. to 8:30 p.m. No charge to ISS Members
Thursday, April 6	Cherry Blossom Festival Congressional Reception Caucus Room—Cannon House Office Building 6:00 p.m. to 8:00 p.m. Tickets \$50/per person Available through NCSS at Box Office Tickets
Friday, April 7	Cherry Blossom Festival Grand Ball Sushi Reception and Dinner The Fairmont Hotel 6:00 p.m. to 12:00 a.m. Tickets \$150/per person Available through ISS HOTLINE: 703-461-3610
Saturday, April 8	Cherry Blossom Festival Parade Constitution Avenue NW, Washington, DC 9:30 a.m. to 12:00 noon No charge for curb side seating
Wednesday, May 24	ISS Annual Meeting and Reception Illinois & ISS History 1922 – 1972 Former State Senator Mark Q. Rhoads—Speaker Fort McNair Officers' Club, SE, Washington, DC 6:30 p.m. to 9:00 p.m. No charge to ISS Members
Monday, May 29	General John A. Logan Memorial Day Celebration Program and Luncheon Logan Circle and the Mary Bethune House—US Park Service 10:00 a.m. to 1:00 p.m. No charge to ISS Members
Saturday, July 23	Chicago Cubs vs. Washington Nationals Upper deck, behind home plate, Section 514 • 40 seats total. 1:05pm \$23.00 per ticket

For additional information to make reservations, or to join the society, please call the ISS HOTLINE at 703-461-3610 or visit the ISS website at www.IllinoisStateSociety.org.



The Illinois State Society
of Washington, DC ★ Founded in 1854
3700 Fort Worth Avenue
Alexandria, VA 22304-1707

Five Tips for Making Fundraising Event Registration More Productive

As the days grow longer, nonprofits everywhere are preparing for spring marathons, walk-a-thons, triathlons, bike-a-thons and just about any kind of a-thon imaginable. Organizations that have planned events in the past know that these events often require a great deal of time and expense—from the registration process through fundraising awards and final accounting.

The following five tips and new capabilities in Convio TeamRaiser (TM) can help any organization make the most of its events by designing a registration process that increases participation, maximizes net proceeds, and provides participants with a painless (and even pleasant) registration experience.

1. Jump start registration

The sooner you get team leaders started on their fundraising activities, and the more resources they can use from previous years, the more time they'll have to meet their fundraising goals for your organization. Begin by sending an email to the previous year's participants inviting them to participate again. For those who cannot participate, provide an option to join as a virtual participant with a donation. Help participants get going quickly using Convio TeamRaiser—participants automatically inherit their past year's Web page, personal address book, and fundraising history, giving them a head start on driving support.

2. Make family registration easy

Event participants often prefer to participate with family members, especially if honoring or memorializing another family member. By reducing the amount of forms to complete and making family registration easy, you can encourage families to participate together, thereby increasing the overall number of registrants. Convio TeamRaiser allows participants to register more than one person in a single transaction, reducing the amount of time they spend entering addresses and credit card numbers and increasing their chances of registering family members.

3. Create more revenue opportunities.

One simple way of increasing revenue for participants is to include options to change the price (up-sells). For example, a runner who wants to see his or her standing in the run might like to rent a timing chip. Additional up-sell possibilities include

the opportunity to purchase a branded water bottle or pack of bumper stickers, a brown-bag lunch or event meal plan, XL or XXL T-shirts, shuttle bus tickets, and shipping. Using new capabilities in Convio TeamRaiser, you can provide these optional add-ons to offer value to participants while increasing your revenue-per-participant ration.

4. Help participants drive Web traffic using personalized URLs

To publicize their participation in your event, participants may use many venues, from church newsletters and emails to social networking contacts and parties. No matter how they spread the word, their friends and family will have an easier time supporting them if participants can easily point supporters to their participation page. Using Convio TeamRaiser, a user can define his or her own catchy page address using nicknames abbreviations or other easily remembered phrases. Personalizing a URL for participants can help them be more efficient in their fundraising efforts, yielding more revenue for your organization.

5. Use widgets

Another great way for participants to publicize their registration and raise money is to use a banner or “widget” on their social networking sites and blogs to drive friends and family to your organization's site and encourage them to participate. Convio Widgets allow participants to drive traffic and support from online community sites such as MySpace, from a blog, or anywhere else on the Web where they are posting content. Widgets also allow participants to post meters showing progress toward their goals. Make sure to point this out to participants as part of the registration process to drive even more support.

CONCLUSION

A well thought out registration process is a key part of a successful event. With widgets, personalized URLs, add-on revenue opportunities, single form registration, and an early start, any organization can get more people involved in its events and raise more funds per participant.

Source: Courtesy of Convio Connection, Convio Inc., Austin, Texas, 2007.

Internal Revenue Service (IRS) Information—Charitable Contributions—Substantiation and Disclosure Requirements



Are you an organization that receives contributions of \$250 or more?

or

Are you an organization that provides goods or services to donors who make contributions of more than \$75?

or

Are you a donor who makes contributions to a charity?

Source: Department of Treasury, Internal Revenue Service, Publication 1771 (Rev. 5 2007), Catalog Number 20054Q.

IRS Publication 1771, *Charitable Contributions–Substantiation and Disclosure Requirements*,

explains the federal tax law for organizations such as charities and churches that receive tax-deductible charitable contributions and for taxpayers who make contributions.

There are recordkeeping and substantiation rules imposed on donors of charitable contributions and disclosure rules imposed on charities that receive certain *quid pro quo* contributions.

- a donor must have a **bank record** or **written communication** from a charity for any monetary contribution before the donor can claim a charitable contribution on his/her federal income tax return
- a donor is responsible for obtaining a **written acknowledgment** from a charity for any single contribution of \$250 or more before the donor can claim a charitable contribution on his/her federal income tax return
- a charitable organization is required to provide a **written disclosure** to a donor who receives goods or services in exchange for a single payment in excess of \$75

More on recordkeeping, written acknowledgments and written disclosures is addressed in this publication.

The rules in this publication do not apply to a donated motor vehicle, boat, or airplane if the claimed value exceeds \$500. For information on vehicle donations, see IRS Publication 4302, *A Charity's Guide to Vehicle Donations*, and IRS Publication 4303, *A Donor's Guide to Vehicle Donations*.

For information about organizations that are qualified to receive charitable contributions, see IRS Publication 526, *Charitable Contributions*. Publication 526 also describes contributions you can (and cannot) deduct, and it explains deduction limits. For assistance about valuing donated property, see IRS Publication 561, *Determining the Value of Donated Property*.

1

Recordkeeping Rules

Requirement

A donor cannot claim a tax deduction for any contribution of cash, a check or other monetary gift unless the donor maintains a record of the contribution in the form of either a bank record (such as a cancelled check) or a written communication from the charity (such as a receipt or letter) showing the name of the charity, the date of the contribution, and the amount of the contribution.

Payroll Deductions

For charitable contributions made by payroll deduction, the donor may use both of the following documents as written communication from the charity:

- a pay stub, Form W-2, Wage and Tax Statement, or other employer-furnished document furnished by the employer that shows the amount withheld and paid to a charitable organization, and
- a pledge card prepared by or at the direction of the charitable organization.

However, if a donor makes a **single contribution of \$250 or more by payroll deduction**, see **Payroll Deductions** under **Written Acknowledgment** for what information the pledge card must include.

2

Written Acknowledgment

Requirement

A donor cannot claim a tax deduction for any single contribution of \$250 or more unless the donor obtains a contemporaneous, written acknowledgment of the contribution from the recipient organization. An organization that does not acknowledge a contribution incurs no penalty; but, without a written acknowledgment, the donor cannot claim the tax deduction. Although it is a donor's responsibility to obtain a written acknowledgment, an organization can assist a donor by providing a timely, written statement containing the following information:

1. name of organization
2. amount of cash contribution
3. description (but not the value) of non-cash contribution
4. statement that no goods or services were provided by the organization in return for the contribution, if that was the case
5. description and good faith estimate of the value of goods or services, if any, that an organization provided in return for the contribution
6. statement that goods or services, if any, that an organization provided in return for the contribution consisted entirely of intangible religious benefits (described later in this publication), if that was the case

It is not necessary to include either the donor's social security number or tax identification number on the acknowledgment.

A separate acknowledgment may be provided for each single contribution of \$250 or more, or one acknowledgment,

such as an annual summary, may be used to substantiate several single contributions of \$250 or more. There are no IRS forms for the acknowledgment. Letters, postcards, or computer-generated forms with the above information are acceptable. An organization can provide either a paper copy of the acknowledgment to the donor, or an organization can provide the acknowledgment electronically, such as via an e-mail addressed to the donor. A donor should not attach the acknowledgment to his or her individual income tax return, but must retain it to substantiate the contribution. Separate contributions of less than \$250 will not be aggregated. An example of this could be weekly offerings to a donor's church of less than \$250 even though the donor's annual total contributions are \$250 or more.



Contemporaneous

Recipient organizations typically send written acknowledgments to donors no later than January 31 of the year following the donation. For the written acknowledgment to be considered contemporaneous with the contribution, a donor must receive the acknowledgment by the earlier of: the date on which the donor actually files his or her

individual federal income tax return for the year of the contribution; or the due date (including extensions) of the return.

Goods and Services

The acknowledgment must describe goods or services an organization provides in exchange for a contribution of \$250 or more. It must also provide a good faith estimate of the value of such goods or services because a donor must generally reduce the amount of the contribution deduction by the fair market value of the goods and services provided by the organization. Goods or services include cash, property, services, benefits or privileges. However, there are important exceptions as described below:

Token Exception — Insubstantial goods or services a charitable organization provides in exchange for contributions do not have to be described in the acknowledgment.

Good and services are considered to be insubstantial if the payment occurs in the context of a fund-raising campaign in which a charitable organization informs the donor of the amount of the contribution that is a deductible contribution, and:

1. the fair market value of the benefits received does not exceed the lesser of 2 percent of the payment or \$89, or
2. the payment is at least \$44.50, the only items provided bear the organization's name or logo (e.g., calendars, mugs, or posters), and the cost of these items is within the limit for "low-cost articles," which is \$8.90.

Free, unordered low-cost articles are also considered to be insubstantial.

Example of a token exception: If a charitable organization gives a coffee mug bearing its logo and costing the organization \$8.90 or less to a donor who contributes \$44.50 or more, the organization may state that no goods or services were provided in return for the \$44.50 contribution. The \$44.50 is fully deductible.

The dollar amounts are for 2007. Guideline amounts are adjusted for inflation. Contact IRS Exempt Organizations Customer Account Services at (877) 829-5500 for annual inflation adjustment information.

Membership Benefits Exception — An annual membership benefit is also considered to be insubstantial if it is provided in exchange for an annual payment of \$75 or less and consists of annual recurring rights or privileges, such as:

1. free or discounted admissions to the charitable organization's facilities or events
2. discounts on purchases from the organization's gift shop
3. free or discounted parking
4. free or discounted admission to member-only events sponsored by an organization, where a per-person cost (not including overhead) is within the "low-cost articles" limits



Example of a membership benefits exception; If a charitable organization offers a \$75 annual membership that allows free admission to all of its weekly events, plus a \$20 poster, a written acknowledgment need only mention the \$20 value of the poster, since the free admission would be considered insubstantial and, therefore, would be disregarded.

Intangible Religious Benefits Exception – If a religious organization provides only “intangible religious benefits” to a contributor, the acknowledgment does not need to describe or value those benefits. It can simply state that the organization provided intangible religious benefits to the contributor.

What are “intangible religious benefits?” Generally, they are benefits provided by a tax-exempt organization operated exclusively for religious purposes, and are not usually sold in commercial transactions outside a donative (gift) context. Examples include admission to a religious ceremony and a *de minimis* tangible benefit, such as wine used in a religious

ceremony. Benefits that are not intangible religious benefits include education leading to a recognized degree, travel services, and consumer goods.

Payroll Deductions

When a donor makes a **single contribution of \$250 or more by payroll deduction**, the donor may use both of the following documents as the written acknowledgment obtained from the organization:

- a pay stub, Form W-2, *Wage and Tax Statement*, or other document furnished by the employer that sets forth the amount withheld by the employer and paid to a charitable organization, and
- a pledge card that includes a statement to the effect that the organization does not provide goods or services in consideration for contributions to the organization by payroll deduction.

Each payroll deduction amount of \$250 or more is treated as a separate contribution for purposes of the \$250 threshold requirement for written acknowledgments.

Unreimbursed Expenses

If a donor makes a single contribution of \$250 or more in the form of unreimbursed expenses, e.g., out-of-pocket transportation expenses incurred in order to perform donated services for an organization, then the donor must obtain a written acknowledgment from the organization containing:

- a description of the services provided by the donor
- a statement of whether or not the organization provided goods or services in return for the contribution
- a description and good faith estimate of the value of goods or services, if any, that an organization provided in return for the contribution

- a statement that goods or services, if any, that an organization provided in return for the contribution consisted entirely of intangible religious benefits (described earlier in this publication), if that was the case

In addition, a donor must maintain adequate records of the unreimbursed expenses. See Publication 526, *Charitable Contributions*, for a description of records that will substantiate a donor's contribution deductions.

Example of an unreimbursed expense: A chosen representative to an annual convention of a charitable organization purchases an airline ticket to travel to the convention. The organization does not reimburse the delegate for the \$500 ticket. The representative should keep a record of the expenditure, such as a copy of the ticket. The representative should obtain from the organization a description of the services that the representative provided and a statement that the representative received no goods or services from the organization.



- “Thank you for your contribution of a used oak baby crib and matching dresser that (organization’s name) received on March 15, 2007. No goods or services were provided in exchange for your contribution.”

The following is an example of a written acknowledgment where a charity accepts contributions in the name of one of its activities:

- “Thank you for your contribution of \$450 to (organization’s name) made in the name of its Special Relief Fund program. No goods or services were provided in exchange for your contribution.”

Examples of Written Acknowledgments

- “Thank you for your cash contribution of \$300 that (organization’s name) received on December 12, 2007. No goods or services were provided in exchange for your contribution.”
- “Thank you for your cash contribution of \$350 that (organization’s name) received on May 6, 2007. In exchange for your contribution, we gave you a cookbook with an estimated fair market value of \$60.”

Written Disclosure

Requirement

A donor may only take a contribution deduction to the extent that his/her contribution exceeds the fair market value of the goods or services the donor receives in return for the contribution; therefore, donors need to know the value of the goods or services. An organization must provide a written disclosure statement to a donor who makes a payment exceeding \$75 partly as a contribution and partly for goods and services provided by the organization. A contribution made by a donor in exchange for goods or services is known as a *quid pro quo* contribution.

Example of a *quid pro quo* contribution: A donor gives a charitable organization \$100 in exchange for a concert ticket with a fair market value of \$40. In this example, the donor's tax deduction may not exceed \$60. Because the donor's payment (*quid pro quo* contribution) exceeds \$75, the charitable organization must furnish a disclosure statement to the donor, even though the deductible amount does not exceed \$75.

A required written disclosure statement must:

- inform a donor that the amount of the contribution that is deductible for federal income tax purposes is limited to the excess of money (and the fair market value of property other than money) contributed by the donor over the value of goods or services provided by the organization
- provide a donor with a good-faith estimate of the fair market value of the goods or services

An organization must furnish a disclosure statement in connection with either the solicitation or the receipt of the *quid pro quo* contribution. The statement must be in writing and must be made in a manner that is likely to come to the attention of the donor. For example, a disclosure in small print within a larger document might not meet this requirement.

Exception

A written disclosure statement is not required:

- where the goods or services given to a donor meet the “token exception,” the “membership benefits exception,” or the “intangible religious benefits exception” described earlier
- where there is no donative element involved in a particular transaction, such as in a typical museum gift shop sale

Penalty

A penalty is imposed on charities that do not meet the written disclosure requirement. The penalty is \$10 per contribution, not to exceed \$5,000 per fundraising event or mailing. An organization may avoid the penalty if it can show that failure to meet the requirements was due to reasonable cause.

Further Information

written acknowledgment – Detailed rules for contemporaneous written acknowledgments are contained in Section 170(f)(8) of the Internal Revenue Code and Section 1.170A-13(f) of the Income Tax Regulations. The “low-cost article” rules are set forth in Section 513(h)(2) of the Code. This information can be found on the IRS Web site at www.irs.gov.

written disclosure – Detailed rules for written disclosure statements are contained in Section 6115 of the Internal Revenue Code and Section 1.6115-1 of the Income Tax Regulation. The penalty rules are contained in Section 6714 of the Code. This information can be found on the IRS Web site at www.irs.gov.

IRS publications – Order publication by calling the IRS at (800) 829-3676. Download IRS publications at www.irs.gov.

IRS customer service – Telephone assistance for general tax information is available by calling IRS customer service toll-free at (800) 829-1040.

EO customer service – Telephone assistance specific to exempt organizations is available by calling IRS Exempt Organizations Customer Account Services toll-free at (877) 829-5500

EO Web site – Visit Exempt Organizations Web site at www.irs.gov/eo.

EO Update – To receive IRS Exempt Organization’s EO Update, a regular e-mail newsletter with information for tax-exempt organizations and tax practitioners who represent them, visit www.irs.gov/eo and click on “EO Newsletter.”

Stay Exempt (www.stayexempt.org) – An IRS interactive web-based training program covering tax compliance issues confronted by small and mid-sized tax-exempt organizations.



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