Seminary Development News

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Inside News

From your Steering Committee:
The Canadian perspective—a connection that goes beyond borders

by Heather Cooke

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From a Canadian perspective, there is something quite exciting about marking the dates of February 16-18, 2006 "Out of the office—Gone to Savannah, Georgia, to participate in the 2006 DIAP Conference."

As director of finance, administration, and development in a small theological college affiliated with Queen's University, in a mid-size Canadian city on the north shore of Lake Ontario, I have been attending the annual DIAP conferences regularly for seven years. My job description requires that I multi-task among chief financial officer, chief operations officer, and chief development officer; however, the success of development endeavors has become increasingly more critical to our college's health and future well-being. Consequently, discovering DIAP in my early days in office was one of my brighter moments.

Responding to an invitation to attend DIAP's New Development Officer's Workshop in September 1998 left me feeling like a fish out of water. I was Canadian in a U.S. context; my portfolio was broader than development; my colleagues were mostly male; and the fund-raising office in the college was non-existent before my appointment. With minimal experience in development, I had little knowledge of how to build a successful development shop.

That first DIAP workshop opened doors of opportunity that have been instrumental in the success of my fund-raising career and the college's development shop.

What DIAP conferences provide is an opportunity to meet with and learn from colleagues that are not only experienced in fund-raising, but also are experienced development officers *in the context of theological education*. The challenges that development officers in theological education face require far more than the ABCs of standard fund-raising. While knowing the ABCs is important, connecting with colleagues who understand our faith journeys, our commitment to theological education, and also believe in the value of what we do is essential to our professional and personal success, health, and well-being. In discovering this connection, being Canadian in a U.S. context has become far less an obstacle.

The Canadian perspective in fund-raising and development is slightly different than the U.S. perspective, and so, on occasion, one will find that a few of the DIAP conference workshops and lectures do not quite "fit." DIAP, however, makes a conscious effort to consider both its Canadian and U.S. membership in planning of conference events. As the Canadian representative on the DIAP Steering Committee, one of my roles is consistently to remind the team to keep the Canadian perspective in balance.

At last year's DIAP Conference in Forth Worth, Texas, thirteen Canadian development professionals were present, and we engaged in a breakfast roundtable session. At the 2006 DIAP Conference in Savannah, we are hopeful that even more Canadian colleagues will plan to attend an informal gathering after one of the evening

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The Association of Theological Schools
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From your Steering Committee: The Canadian perspective—a connection that goes beyond borders

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sessions to continue conversations from a truly Canadian perspective about how we can better serve Canadian conference members through the network.

The 2006 Savannah Conference theme of "Communicating the Vision" promises to be woven through all the keynote speeches, lectures, and workshop events, and it is an important theme for all colleagues in advancement work. Please mark it on your calendar, and make your attendance a priority. You will not be disappointed! The line-up of speakers and events is dynamic, and Savannah is one of the most charming southern towns you ever will visit. *SDN*

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Seminary Development News welcomes submissions of unsolicited manuscripts on any aspect of development in theological education. Manuscripts should be typed, double-spaced, and 800 to 1,600 words in length (three-to-six typewritten pages) and if at all possible submitted via electronic mail to the address below. All manuscripts will be scheduled for publication at the editor's discretion and will be edited to conform to the newsletter's style and format. Unaccepted manuscripts sent to the editor via the postal service will not be returned unless accompanied by a self-addressed envelope, affixed with the proper postage. The deadline for submissions is eight weeks in advance of each issue, as follows: March 1 for the May issue and October 1 for the December issue.

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Assessing your advancement program

by Gary Hoag

At the request of its president and board in the summer of 2004, Denver Seminary launched a study designed to constitute a benchmark in the evaluation of the efficiency and effectiveness of our advancement programs in comparison to selected ATS peer institutions. Ten categories for analysis were denoted collaboratively by our president, board, and advancement team as follows:

Giving—total giving by designation and by constituency.

Cost of fund-raising—advancement budget for personnel and non-personnel expenses.

List—number of constituents receiving the seminary magazine.

Research—number of prospects researched.

Donor base —number of donors, new donors, board/faculty/staff giving percentages.

Estates—number of estate-planning events, legacy-society membership, bequest-giving total.

Team—advancement staff size and number of active advancement volunteers.

Alums—total alum giving, alum giving percentage.

Point-of-entry events—number of activities and total number of attendees.

Calls/mailings—frequency of direct-mail appeals, donor calls, foundation proposals submitted/granted.

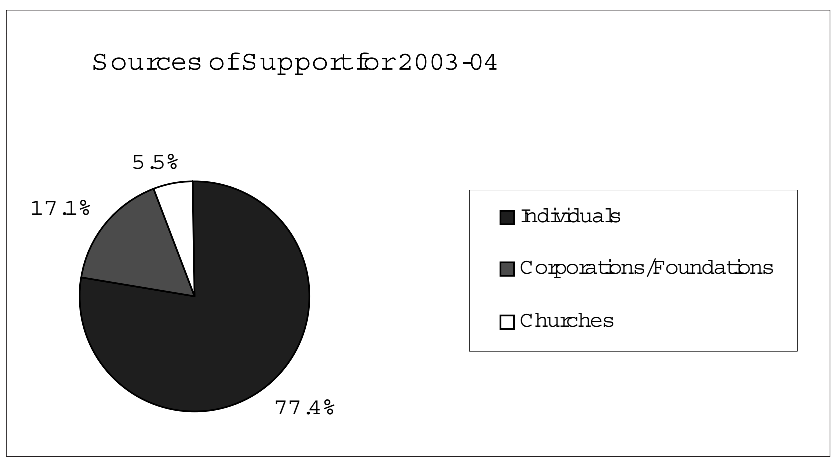
Ten similar institutions were invited to participate in the study, and eight responded: Asbury Theological Seminary, Covenant Theological Seminary, Dallas Theological Seminary, our own Denver Seminary, Fuller Theological Seminary, Gordon-Conwell Theological Seminary, Reformed Theological Seminary, and Western Theological Seminary.

For each of these schools, I compiled an extensive confidential report and an executive summary that could be shared with the broader DIAP audience. As findings emerged in the ten different areas, the executive summary soon took the form of an "ATS Advancement Top-Ten List." Below are the top-ten findings from our peer-group study, illustrated with selected statistics and graphs.

Gary Hoag is vice president of advancement at Denver Seminary, now located in Littleton, Colorado, and serves as a member of the DIAP Steering Committee. He will offer the workshop noted at the DIAP Conference in Savannah, Georgia, in February 2006.

ATS Advancement Top Ten List

10. Most of the money comes from individuals! This finding, which held true for each respondent, serves as a reminder that our priority in allocating staff time and budget money should be in raising individual stewards to support our seminary, while carefully doing acquisition and managing attrition.



Regarding donor acquisition, the average percentage of the support bases that were new donors in 2003-2004 totaled 25.9%. Regarding donor attrition, the average percentage of the support bases which did not give in 2003-2004 was 23.0%.

As we invite people in the front door of our support bases as new givers, we must be sure to close the back door, because the attrition numbers

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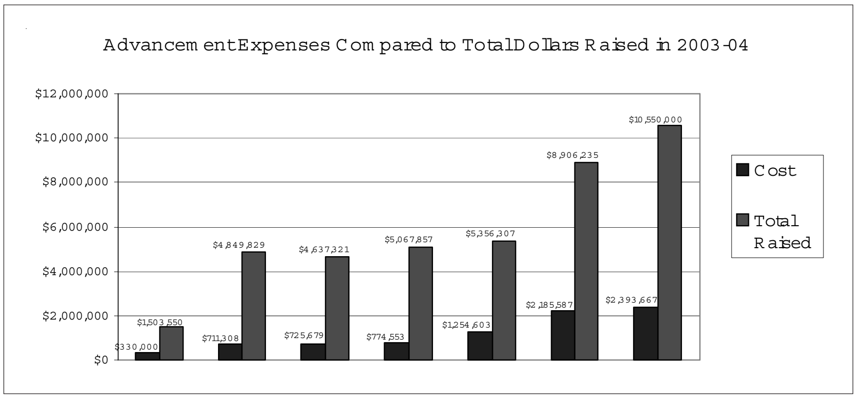
are almost as high as our acquisition numbers. For each participating school, this finding was motivation to pay increased attention to these key indicators so as to ensure that our support bases expand rather than contract.

9. Larger teams may be raising more money than smaller but, at the same time, their cost of fund-raising was much higher comparatively, so the additional gifts appear to be coming at a greater expense.



Schools that spent more money on advancement personnel and non-personnel expenses raised more money, but at a higher cost. Costs ranged from 14.7 cents to raise a dollar to 24.5 cents to raise a dollar.

8. Seminaries that sent direct mail frequently to their constituents had a broader donor base than those that did not; however, the school that replaced direct mail with personalized, hand-signed letters from the president increased its donor base by the largest percentage.

Test a variety of strategies to find out what works best with your constituency.

7. If our institutions use donor-contact management systems, we may not be using them to their full potential because few respondents communicated clearly the number of calls made by the president, vice president, and other staff members. Keeping better records should make us more efficient and effective.

Four schools could not list the number of donor contacts made in a given year and three estimated the number; only one knew for certain. As our development computer software systems become increasingly more sophisticated, we must be certain to utilize the features of these systems so as to ensure the long-term health and growth of our advancement programs.

6. There is almost nothing being done in the area of prospect research. Interestingly, the school with the lowest cost to raise a dollar was the school that was actively engaged in it. Prospect research enables a staff to prioritize time by calling on those who may have a greater capacity and propensity to give.

The school that led the way in this area utilized a one-a-day approach to prospect research. At this school, one staff member focused on researching an average of one prospect per day during the course of the year, and it is paying off. A prospect with little giving history made a six-figure campaign pledge as a result of research that prepared the vice president to make a significant request for support.

5. Support from full-time faculty and staff was remarkably low at most institutions. Ask and you may receive 100% support, as one school did. Alum giving is another area where all schools had room for growth. Do not expect big money, but strong participation can send a message to others to give as well.

Have you preached to the choir about participation? Though their dollars may not be significant, generating unanimous participation from the seminary "family" provided a healthy talking point for encouraging alums and friends to join in supporting the seminary.

The average percentage of full-time faculty and staff who gave in 2003-2004 was 38.4% while the percentage of alum participation ranged from 4% to 32%.

The school on the bottom end of the spectrum (4%) chose to focus resources on more productive prospects. Interestingly, the school with the top alum giving percentage (32%) raised the least total money. Alum support represented only 1% to 12% of total giving; the average was 4%. Thus an average of 96% of support came from non-alums.

4. It seems the more a school invests in estate planning, the more it receives in matured estates—although of course the returns are unpredictable. Most institutions could be more intentional about encouraging constituents to include the seminary both in their present giving and their estate planning.

Fifty percent of the respondents hosted events tied to estate planning. Those schools also received more gifts from matured estates. One-quarter of the schools had no idea if any of their constituents had included their school in their estate plans.

From this basic data, we can conclude that most of our programs need to be more intentional about what we do in the planned-giving area.

3. Foundation giving was the most inconsistent source of current gift income for virtually all the schools in the study. Though there is funding to be secured from foundations, it may be hard to come by with consistency. We must be increasingly strategic in our efforts in this area.

Success in the foundations area was attributed to three things. First, some foundations support schools in specific geographic locations. Second, many foundations give when schools establish relationships with their leadership. Third, as some major donors are establishing private foundations, their giving now comes through foundation rather than individual channels. Schools must pay attention to each of these areas to secure foundation support.

2. We all need to sharpen our use of volunteers. Intriguingly, the school with the most volunteers also had the most event attendees, the most donors, and raised the most money. Each of our schools could benefit from the synergy that takes place when our volunteers get involved and when they help us get prospective givers to events.

Schools ranged from hosting no events and having no volunteers to hosting 53 events with more than 4,000 in attendance. Two schools hosted 95% of the events in the study. Both of those schools have adopted the *Point-of-Entry* event approach as articulated by Terry Axelrod at the DIAP Conference in Tucson in 2003, and as outlined in her book, *Raising More Money*.

1. Each school demonstrated the desire to help other schools excel in our Kingdom endeavors by doing the work of participating in this study. From here, by God's grace, let us excel still more through evaluating these indicators at our own schools and by serving one another in our areas of strength so that we all may prosper.

Plan to attend the next DIAP Conference and attend a simple "how-to" workshop for doing self-assessment and conducting a peer-group study. It could dramatically improve the efficiency and effectiveness of your program. *SDN*

New to development?

If you are new to development in theological education, you will find the book *Seminary Development News: The First Ten Years* to be a helpful resource.

Compiled by former *SDN* editor David Heetland and published in 1996 with a grant from Lilly Endowment Inc., it is a compilation of articles from the first ten years of this newsletter.

The book covers such topics as theology and fund-raising, fund-raising basics, working with foundations, planned giving, major-gift fund-raising, working with other professionals, balancing personal and professional lives, and looking to the future.

It also features a valuable introduction by Fred Hofheinz, former program director for religion of Lilly Endowment, entitled "Celebrating Ten Years of Development in Theological Education."

Persons new to theological education development may receive a free copy by contacting Mary McMillan in the ATS office via phone, 412-788-6505, Ext. 237 or e-mail (mcmillan@ats.edu). *SDN*

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Capital campaigns: doing them wrong

by Richard Eppinga

Although each capital campaign and each theological school is unique, there are "Don'ts" and "Do's" that are broadly applicable. In this and the following article, there are practical things emphasized that we can do (or not do) to elicit capital-campaign returns out of proportion to the resources we employ.

The development office at Calvin Theological Seminary, a school of 320 students that was established in 1876, is a small shop and only fifteen years old. Having worked in fund-raising since 1979, I was the first hire in 1991. When I arrived, an $8-million capital campaign was underway. It was struggling and took an unusual turn before slightly exceeding its goal. In 2001-02, we undertook a briefer and smaller campaign—this one for $5 million. It, too, met its goal.

Likely, ours were smaller capital campaigns than yours; they certainly were compared to those of Duke Divinity School (see the following article). Still, they loom large in the financial history of our seminary.

For many years, I've been interested in mistakes made in capital campaigns. Between our own and those I've gleaned from colleagues at DIAP conferences, I've accumulated quite a list of wrong ways to do them. It's curious as to how and why so many things that are so patently, obviously wrong, nevertheless get done anyway. They don't have to be.

Many capital campaigns are "by the book." There is a good reason for "the book"—the distilled wisdom of experience over time. Generally speaking, "the book" works. Deviation from it—unless for good and sufficient reason—can be perilous, and ignoring "the book" altogether can court disaster.

Here is a list—by no means scientific and certainly not complete—of ways to ignore the book and risk doing capital campaigns wrong.

Internal determination

- Decide on a whim that we should have a capital campaign.
- Postpone or ignore altogether the process of internal determination (among faculty, staff, board, advisory bodies, and so forth) of whether or not a campaign is necessary or advisable.

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- Minimize the importance of consensus.
- Allow optimistic wishes rather than demonstrated needs to inflate the campaign goal.
- Figure that the case statement will "write itself" and easily can be created anywhere down the line.
- Assume that "the money is there."
- Believe that a campaign plan is not necessary because "all we have to do is start calling our friends," stopping only when the goal is reached.
- Present the board of trustees a *fait accompli*—that is, things have gone so far that it is more damaging to say no than to authorize implementation.

External validation

- Postpone, skimp on, or skip altogether the process of external validation.
- Determine that professional consultants are parasites who overcharge for simple advice we can figure out ourselves more effectively and certainly more cheaply.
- Determine that a feasibility study is not necessary.
- Consider study of our "giving pyramid" a waste of time.
- Assume that the number of gifts received will approximate the number of requests made.
- Consider cost analysis unnecessary or, if one is done, give it short shrift.

Implementation

- Fail to achieve 100% participation in giving by members of our board of trustees.

- Decide not to use trustees in solicitation.

- Determine an honorary campaign chair or co-chairs, campaign cabinet or steering committee, campaign operating committees, campaign stationery as unnecessary.

- Fail to use seminary faculty members to solicit faculty members and staff members to solicit staff members.

- Assume that "of course we will achieve 100% faculty and staff participation; everyone will jump at the opportunity to give."

- Give our alums no role at all to play.

- Write off foundations as a source of revenue because we didn't start early enough and any foundation decisions at this late date might be made after the close of the campaign.

- Ignore the potential benefits of regional strategies and approaches.

- Consistently use the word "pledge" in regard to one-time or multi-year gifts, ignoring the fact that donor-advised funds cannot honor pledges.

- Neglect to "projectize." Fail to divide our overall campaign into many individual projects of varying size so there are attractive, concrete giving options for donors large and small.

- Don't present our potential donors with varieties of giving options—cash, appreciated securities, in-kind gifts, deferred gifts.

- Fail to consider whether or not we will count deferred giving toward the campaign goal.

- Assume that our annual campaign for general operating expenses will not be affected by the capital campaign.

- Reject folding the annual campaign into the capital-campaign goal.

- Raid our prime annual-fund givers for capital gifts when we become desperate to achieve our capital goal.

- Neglect to consider what gifts we will not accept until we are presented with one.

- Figure that our development staff members can handle the campaign on top of all their regular responsibilities.

- Decide that "silent phase" and "public phase" are the meaningless jargon of consultants.

Conclusion

- Give inadequate attention to expressions of appreciation to our benefactors.

- Ignore recognition of those who labored in the campaign.

- Forget celebration, pure and simple, with thanks to God.

Aftermath

- Don't follow up carefully with multiyear commitments and deferred gifts.

- Fail to keep adequate and updated records.

- Delay the "naming" of special areas, items, and programs.

- Neglect a "post-mortem" to analyze successes and failures.

- Neglect to preserve records for our next campaign—because there will be another campaign.

I referred earlier to our struggling first campaign. Although new to the job, I was by no means new to fund-raising. Still, the first and best thing I did right was attend the February 1992 DIAP Conference in San Antonio, Texas. There, conference organizers David Harkins (Eden Theological Seminary) and Tom Craine (Iliff School of Theology) took an hour of their time amidst hectic schedules to counsel me. Their advice: declare a successful end to phase one of our capital campaign, put things on hold for a year, and then launch into phase two.

I followed their advice and the campaign was successful. Since that time, I have attended each DIAP conference and asked advice of wise, experienced, and successful colleagues—friends like Wes Brown, whose article follows. *SDN*

Capital campaigns: getting them right

by Wesley F. Brown

WESLEY F. BROWN *is associate dean for external relations of Duke Divinity School in Durham, North Carolina.*

"Capital Campaign." The very words call forth physical reactions—anxiety, dread, cold sweats, and tears. You understand exactly.

A campaign is a good and necessary component of long-term development practice in any school. No one ever should claim expertise. Each campaign and institution is unique, but all should acknowledge being beneficiaries of grace: the unanticipated major gift that comes at just the right moment, the aggravating volunteer who suddenly brings in half-a-dozen big contributions, a good stock market, the outpouring of support from core constituents, and the joy of momentum.

I have been part of two major fund-raising efforts at Duke during the past twenty-three years. The first was during the mid-1980s: loosely organized and semi-comprehensive. The divinity school is a member of a community of graduate professional schools (law, medicine, nursing, business, environment, the graduate school) plus undergraduate schools of arts and sciences and engineering. These, along with libraries, athletics, and presidential priorities, all need lots of money and ask for lots of money. Duke University is smaller than you might think: about 12,000 total students—half undergraduates.

The campaign in the 1980s asked each school to set a target, added them up, and, during about five years, achieved more than enough to say that the goal had been surpassed, but there was little enthusiasm and less cooperation. The divinity school set a $10 million goal and we raised $11.5 million, but we all learned from a disjointed campaign that we could and must do better.

In the mid-1990s with a new academic strategic plan, a new president, and revived interest in funding excellence, we planned together—with exceptional counsel, appropriate feasibility studies, and renewed spirits—for major success. In 1996, we opened the quiet phase of a comprehensive campaign, cleverly called "The Campaign for Duke."

The divinity school began as a small-time player (typical in a university setting), but nonetheless honored and given full partnership in decisions, receiving professional counsel and, most importantly, meeting at least monthly with colleagues in the other graduate professional schools to consider broad strategies, prospect-clearance issues, and so forth.

We worked carefully to determine our goal. The campaign would be two years quiet plus five years noisy—ending December 31, 2003. It would be comprehensive, counting all dollars for all purposes. The divinity school wanted $40 million to increase endowment, expand programs, and enable some physical renovations, but it was felt by university leadership that our record of support and rather shallow prospect pool would make $35 million a stretch.

The overall goal for The Campaign for Duke was set at $1.5 billion—very ambitious. We moved forward and enjoyed the economic boom of the late 1990s. By the time we went public in 1998, we and other schools at Duke had half our goal in hand. By fall 2000, it was clear that everyone would surpass the original goals, so we reevaluated and together raised our vision, anticipating the three final years to be as strong as the first four.

The overall goal jumped to $2 billion, and the divinity school's audacious contribution to that total would be $85 million (a $50 million increase!) that would include a new building addition that had been dreamed about for two decades. We were emboldened by unexpectedly generous support from several individual donors (gifts of $13.5 million from one) and foundations.

No one anticipated the devastating attacks and psychological/economic impact of 9/11, but neither did we anticipate the incalculable value of momentum.

Momentum is the critical ingredient for a campaign, whatever the goal. Momentum is when the constituents are finally understanding and appreciating what you are doing. It is when they see major gifts coming in, when they read about the difference new programs are making, and when they are asked in timely, thoughtful ways to participate. Momentum drives the second or third gift—larger than the previous contributions. It makes your cause a priority among priorities, even when money is tight.

During the course of The Campaign for Duke, a total of $2.36 billion was raised—the fifth-highest total ever for any university. Did the divinity school benefit from being part of such a successful endeavor? You bet! We ended up with total commitments of $102 million. During the seven years of the campaign, we initiated twenty-four new funded programs, renovated classrooms and the library, established endowed funds to support forty-three new scholarships, four professorships, and grew our endowment by more than $20 million to $69 million (still only eighteenth place among theological schools).

In the closing year of the campaign we began a $22-million building addition. That endeavor, an effort we called The Second Mile, would inevitably go beyond The Campaign for Duke. I am delighted to tell you that the building and fund-raising for it are virtually complete now, fourteen months after the campaign closed. In other words, we have been able to maintain a pace of $12 million or so per year in fund-raising for the divinity school—and we need it—which, I must tell you, is one of the consequences of success.

What did we do right? What do you want to do right? Here are seven suggestions from our experience.

First, we cared for details. We planned thoughtfully and ultimately made a compelling case, aiming the campaign components (scholarships, programs, bricks-and-mortar, and endowment opportunities) at the right constituents. We were careful to thank and publicly recognize donors promptly and appropriately. We followed up each prospect lead and inquiry as best we could. We were frequently disappointed, but often rewarded.

Second, we gathered wise and generous friends to give us continuing counsel and we listened to them. Our campaign committee provided us a reliable sounding board and the members came through with more than $21 million in gifts they made or influenced.

Third, we told our story effectively. Our *Divinity* magazine took a quantum leap forward in content and appearance. We launched and continually improved a dynamic website. We benefited from university publications that gave us equal time and space with our sister schools. We pressed the theme of "Transforming Ministry" consistently through every medium and meeting. We put faces and stories together with programs. We tracked the work of the campaign systematically and published progress charts along with gift stories.

Fourth, we took every opportunity to ask. Most failed fund-raising is ultimately a failure to bring the qualified, well-informed prospect to the point of asking! We were straightforward, but also bold, to invite significant investment, and we were rewarded.

Fifth, we had trusted colleagues with whom we shared ideas, joys and sorrows, triumphs and failures, all working together for a common goal. It might surprise you to learn that only a scant handful of gifts came to the divinity school through the work or referral of other Duke development officers. At Duke—as at most universities—it is every tub on its own bottom. Each school and college has its own development team, prospect list, goals, and so forth, but under outstanding leadership, what we did was to encourage one another and work as a team—the sum being significantly greater than the parts. Your situation might not be a university, but you have colleagues nonetheless at sister institutions whether related by denomination or region. There is no substitute for the advice of a trusted friend.

Sixth, we celebrated our successes and acknowledged our failures. This campaign became an intimate part of our lives. We have a small staff and everyone contributes to a successful end. We left some big gifts out there and we trusted some donors who let us down, but we also witnessed the miraculous. Who among us (fund-raisers) doesn't know the serendipity of an unexpected unrestricted bequest or the donor who gives an amount ten times greater than what was anticipated?

As a wrap-up, we published early in 2004 a final campaign report. It was titled "Transforming Ministry Together with Joy and Thanksgiving" and it listed all donors alphabetically without titles or gift amounts. The only distinction was bold type for graduates. The listing of more than 5,000 donors was interspersed with brief stories of changed lives and perspectives, new initiatives, discoveries in ministry, joyful countenances, and the overall statistics. I have never heard any complaint—only gratitude for being associated and celebrating with a good endeavor.

Seventh, we were lucky…or blessed. No written recipe guarantees a successful campaign. Sometimes success must be measured in alternative ways and a campaign concluded with results other than expected. No consultant knows much more than you do. We had outstanding counsel (the same individual for the whole of The Campaign for Duke) who encouraged, cajoled, pressed and, with us, was amazed by our final outcomes. You simply need to leave room for the Spirit of God to work through or in spite of your own efforts, and then you say, "thank you." *SDN*

Five secrets to a successful special event

by Jo-Anne Mancini

There are many components that make up a comprehensive fund-raising program. One of the most exciting is the planning and implantation of special events. Your events can be smash hits through foresight, proper planning, and spreading around the thanks.

There are at least five critical elements to consider when organizing a successful special event. These are having a clear purpose, developing a well thought out plan of action, setting the critical path, staging the event itself, and following up with recognition.

When any of these elements is underemphasized or, worse yet, overlooked, your job is made that much more difficult, and chances are your event will be diminished.

A clear purpose

The experienced special events planner asks a first and most important question: why is my organization holding the event? The question must be answered before you can begin to determine the plan. The status of any current campaign must be factored into the answer, too. Here are two critical questions to ask yourself and your staff, followed by possible answers, in order to determine the all-important primary purpose.

What are your goals and intentions?

- Elevate public awareness. There is the ongoing need for increased exposure to different audiences.
- Public relations/media attention. Is there a service/program you provide that needs more notice?
- Attract new sponsors. They may be corporate sponsors you'd like to ask to join your efforts, or individual sponsors not yet cultivated.
- Solicit new supporters. We all have new prospects we want to introduce to the organization.
- Cultivate and inspire existing support. It takes a lot more time and money to cultivate a new donor than to keep those who already support you—constantly nurture current relationships.
- Increase the number of volunteers. Many non-profit organizations rely on volunteers to carry out important tasks.
- Increase the mailing list. A special event often will bring an infusion of new names for your direct-mail appeal.
- Call to action. A special event is a great way to launch a new campaign or to celebrate a successful campaign conclusion.
- Pay tribute. Special events are a wonderful way to honor benefactors and special friends.

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What do you hope to achieve?

- Get the "right" people to attend. This is the determining factor in the degree of your success.
- Educate the constituency. Its knowledge is an indispensable tool in the support of your mission and vision.
- Increase awareness of services provided. A special event more fully informs your audience.
- Celebrate successes to date. Everyone loves to support a successful organization.
- Increase financial support. Additional monies help you realize your mission and vision.
- Inspire others. Your dreams become your benefactors' dreams as you work together toward a common goal.

A plan of action

Many special events, born of splendid ideas and great enthusiasm, fail because of a lack of nuts-and-bolts planning. Here's how to prevent this from happening to you.

Revenue-expense budget. It is critical to estimate your net revenue in "dollars and *sense*." The most effective approach is to keep your event budget as a separate entity, apart from your other fund-raising efforts. Partitioning will give you flexibility of resources and a true picture of your financial success. Remember that each event is different. If you have a past event to use as a guide, revisit it. If not, then walk through your event from beginning to end. Itemize each task on a spreadsheet.

Who's in charge? Project management will affect every aspect of the event. There is no room for confusion as to who is in charge. Also, know your organization's culture and hierarchy, and how decisions are made. The lead person must facilitate consistent communications with staff and volunteers.

Staff resources. Who will accomplish the work? Depending on the size of your department, all or some of the staff will be allocated to your event. Ensure that everyone working on your event (staff, volunteers, suppliers, and vendors) knows what is expected of him or her. Expectations may include flexibility in work hours, tasks, timelines, proper dress, and protocol issues.

Everyone needs to feel a part of the success. If necessary, hire temporary staff to accomplish the job. Check your budget allocation. It may be a wise investment to allocate funds for the necessary staff resources. Careful attention to staff resources will help to build team loyalty. There is no reason a special event cannot be fun for all involved.

What type of event? Remember, if the event is not considered important enough to your organization, your constituents will sense it is not important enough to attend. The secret to selecting the perfect event is to incorporate the essence of your organization's mission and vision into visible, tangible displays. The organization must ensure the event is a good match; not everyone can and should sponsor a black-tie dinner.

Interact with other professionals for ideas and feedback. You do not have to reinvent the wheel, but do ensure that you customize elements to fit your organization. What has been successful for others may not work for you. Strive for participant involvement. Personal interaction leads to greater education and ownership of your cause.

Location, location, location. Many organizations have facilities on-site that often lend themselves perfectly to the event. Using your own facility allows donors and prospects to tour the campus and be involved on location prior to and following the event. On the other hand, off-site locations offer a host of different services, features, and amenities from which to choose. The type of event will determine which you need.

Be conscious of parking arrangements, location of the room inside the venue, venue stipulations for entertainment productions, signage guidelines, and so forth. Always visit the site prior to making any contractual agreement. Do a virtual walk-though of the event from the arrival of the first guest to the departure of your last to ensure the venue is suitable.

Venues include hotels, convention centers, restaurants, churches and religious halls, private clubs, private estate homes, theaters, museums, galleries, race tracks, yachts, airport hangers, amusement parks, sports complexes, heritage buildings, skating rinks, night clubs, outdoor gardens, wineries, parks—the list goes on.

Weather conditions may be a concern when planning an outdoor affair. There are beautiful tents available today that can add to the ambiance of your event and provide shelter from the elements if the need arises.

Timing is everything. When planning your event, allow yourself sufficient time to achieve maximum results. Yes, it may be possible to put together a major event in a matter of weeks, but there always is a cost.

Be aware of your target audience when deciding on the time of day. Know when other events are planned in your community, and be conscious of religious observances, civic holidays, school calendars, and major sporting events. You need to know if guests are arriving from out of town.

The critical path

The "critical path" is a project-management method that helps you to establish which functions are critical—meaning they have to be done right and on time or else the entire project will suffer. In short, it all comes down to execution. The best development plan, supported by endless meetings and input, is not a replacement for solid execution the day of your event. Keep in mind: life happens by itself, but events need to be orchestrated from beginning to end.

Staging

The curtain soon will be going up on your special event. You have everything covered.

- Target audience. Be certain when invitations are sent out that you indicate whether or not they are transferable.
- Media. Structure time for interviews and access to the right people.
- Officials. Ensure they are properly introduced during your program.
- Security. Assure your guests that they are in a safe environment and make it so.
- Staff. Provide playbooks for everyone that include roles and responsibilities. Dress rehearsal is mandatory. Staff and volunteers must attend.
- Children. Special attention is required for children who are attending or who are part of the entertainment.

Recognition

Saying the simple words "thank you" is a powerful tool that must not be lost in the excitement of your success. Acknowledge those who made your event a home run. Make sure those who attend are thanked as well as all sponsors. Remember, without their support your event would not have been possible.

The best time to say thanks is immediately following your event. Be creative with your gratitude. Consider taking pictures at your event, publicly presenting a thank-you gift, recognizing attendees in your next newsletter, placing a thank-you note with an invitation to join next year's committee, including handwritten notes from the committee chairperson, and having your president make personal phone calls. The list is endless and the extra time is worth it.

And when all is done, take your staff to an appreciation lunch. They will value being recognized for their efforts in making the event a smash hit. Along with the dessert, pass the praise around! *SDN*

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Barbara A. Chaapel, Director of Communications/Publications
Princeton Theological Seminary

New Development Officer Workshop: ABCs of Faith-filled Fund Raising
Tim Kubatzky, Vice President for Institutional Advancement
Austin Presbyterian Theological Seminary

Keynote Speakers

Daniel Aleshire, Executive Director
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