**Communities In Schools of North Carolina**

**Special Event Assessment**

**Affiliate:**

**Introduction:** Special Events can be an effective means for raising funds and/or engaging others in your organization. However, among fundraising methods, they are often the most costly approach to raising funds and often require a significant amount of staff and volunteer time to plan and implement successfully. This worksheet provides some suggestions to consider in planning and evaluating your organization’s special events.

**Assessment Questions:**

1. Special Event Information
   1. Event Name and Description:
   2. Event Date
2. Objectives of this Special Event:

🞎 Raise funds

🞎 Social event

🞎 Community connection/PR opportunity

🞎 Connect with new potential donors

* Elaborate the specific goals or outcomes:
* How will you follow up with attendees to further connect them to your organization?

1. Type of Special Event

🞎 Hosted by a business or other organization, where we receive proceeds.

🞎 Regular event we have conducted before. (If so, review previous results and evaluate trends.)

🞎 New event for us to establish. (If so, is this type of event offered by others in the community?)

🞎 Other:

1. Risk Management
   1. Will any alcohol be served at this event? \_\_\_\_\_\_\_\_\_
   2. Has liability insurance been secured? \_\_\_\_\_\_\_\_\_
   3. Please confirm that staff and volunteers are aware of the policy that neither CISNC nor its volunteers may transport students to this event. \_\_\_\_\_\_\_\_\_
2. Staff/Volunteer Needs
   1. # of staff/volunteers needed: \_\_\_\_\_\_\_\_\_\_
   2. Name of volunteer chair for the event: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Or, what are the next steps for securing a chair of the event?

* 1. Are volunteers enthusiastic about preparing for and conducting this event? \_\_\_\_\_\_\_
  2. # of staff or volunteer hours:

|  |  |  |
| --- | --- | --- |
|  | **Estimated Time for Staff** | **Estimated Time for Volunteers** |
| Planning and Preparing (months prior to event) |  |  |
| Week of the event |  |  |
| Day of the event |  |  |
| **Total # of hours needed:** |  |  |

1. Budget for Special Event:

*Note: The following income and expense line items may not be applicable to each event. Please modify as needed for your particular event.*

***Income***

| **Line Items** | **$ Goal** | **Notes** | **Staff/Volunteer Assumptions** |
| --- | --- | --- | --- |
| Sponsors |  | X# sponsors at what levels? | How many staff/volunteers will secure how many sponsorships? |
| Ticket Sales |  | X# tickets at $Y. Account for complimentary tickets by reducing the estimate accordingly. | Assumptions about how many staff/volunteers will sell how many tickets each. |
| Auction Proceeds |  |  | How many staff/volunteers will secure how many items? |
| Advertising in Program |  |  | Factor staff/volunteer staff time needed to complete this. |
| General Donations |  |  | Request donations in event invitation? |
| Other: |  |  |  |
| **Total** |  |  |  |

***Expenses***

| **Line Items** | **Amount Budgeted** | **Notes** |
| --- | --- | --- |
| Food & beverage |  | Account for all people who will attend and not just ticket purchasers |
| Facility fees |  | e.g., rental, servers, cleaning, etc. |
| Equipment Rental |  |  |
| Decorations and event favors for attendees |  |  |
| Contracted Expenses |  |  |
| PR, Marketing, and Supplies |  | e.g., sponsor packets, invitations, nametags, signage, brochures for distribution, etc. |
| Insurance Expense |  |  |
| Other |  |  |
| **Total** |  |  |

***Fundraising Profit Potential***

Total Income – Expenses = \_\_\_\_\_\_\_\_\_

1. Return on Energy Factor
   1. Special Event Profit (from Question #6): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   2. # Paid/Volunteer Hours (from Question #5): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Return on Energy/Fundraising dollar/work hour (A/B): $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

1. Valuing the tax-deductible portion of event tickets

* Note that the IRS indicates that “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” (IRS Publication 1771). For events with donations where donors receive something in exchange (e.g., dinner), the value of that thing needs to be listed on the receipt.
* To calculate the value of the goods or services, consider what would the cost would be for a similar event if it were not a fundraiser. In other words, don’t base it on your expenses if the food or other items were donated at less than retail value. Instead, determine what a comparable meal or item would cost in your community.
* For example, if a person buys a ticket for $40 and lunch is included as part of the event, estimate the fair market value of that lunch. If the value is $12, the tax-deductible portion of the $40 ticket purchase is $28.