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# TIPS

## ON WORKING WITH SPECIAL EVENTS CONSULTANTS

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BY RON WONG

Here is a scenario that is common to many small- to medium-sized nonprofit organizations that have staged their own fundraisers:

It's the day after your annual event and staff members are staggering into the office with heavy feet and weary knees. The smiles that they used during their volunteer greeting shifts have disappeared from their faces overnight. For the past three years, your agency has coordinated its own grassroots fundraiser, which has from all accounts been a terrific success, highlighted by a touching awards presentation and inspiring words from your visionary executive director. This annual house party has created lots of goodwill, incredible awareness of your programs, and an outpouring of compassionate support from the community.

This formula for an annual event has worked very well for your organization. Each year, a generous board co-chair has hosted the reception in her beautiful home with outdoor deck, which has a lovely view. As in the past, she absorbed the food and beverage costs, which would have been your biggest line item expenses. This year, you reached a sellout capacity of 150 guests and your staff worked especially hard to increase the number of sponsorships and ticket sales to raise a net revenue of \$30,000.

In previous years, the event had been heavily volunteer-driven. This year was different because of the party's growth. Apart from the two hours yesterday that a board member and a volunteer spent arranging floral displays, your staff performed all of the work. Between managing the guest list database, fielding calls about parking and directions to the venue, and copywriting and proofing the printed program, your administrative assistant and office manager both found themselves dedicating the last two weeks to this project.

What we have here is an example of being overwhelmed by success. This special event has somehow changed from being a board project to being a staff project and it's costing the organization too much in staff time and involvement. It's time to call in a special events expert. Such a person can relieve your staff of most of the detail work of such an event, often along with providing savings on expenses and money-saving suggestions for smoother process.

### WHERE TO FIND A SPECIAL EVENTS CONSULTANT

Where do you find an appropriate person? One place to look is to your sister organizations that have used event consultants for their annual events. Who have they used and were they happy with their services?

Another source would be a nonprofit support center where you will find referrals for consultants who have

been carefully screened and who might be profiled in their directory. Interview a few consultants to explore the differences between them and to see who would best suit your needs. You will want to develop an RFP (request for proposal) identifying your specific needs and serving as a barometer for your committee to evaluate the consultant's skills and strengths.

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### BUT HOW CAN WE SPEND MORE MONEY?

As an organization, you will need to address the issue of spending money (in this case on a consultant) in order to make money. This is one of the tenets of the develop-

ment function that your organization might not have adopted yet. Financially, you must decide that the services provided by the consultant are worth the added costs of hiring a professional. Most of the time, just by considering bringing in a consultant, it's clear that you've made that

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decision already. One perspective is to view paying a consultant as similar to adding a part-time staff person that will be a revenue-generating position (I have seen instances in which a consultant has made suggestions that have generated enough funds to pay for their entire consulting fee).

A special events consultant has the potential to bring great change and to make important recommendations. One of the first steps might be to assess the viability of maintaining your event's status quo. Should you still have a house party or might another type of event attract more attendees to support your cause? Are there other revenue streams to consider, such as a raffle or silent auction (to occur separately or in conjunction with the event)?

## WHAT A CONSULTANT CAN BRING

One of the immediate steps a consultant would take is to analyze your event timeline and budget. If they are detailed and realistic, these two documents are the cornerstones of your planning process. Once adopted by your committee, these documents should be strictly adhered to and yet should be flexible enough to reflect decisions made during the process.

For instance, you've set a deadline of April 10th for the invitations to go to press, but you're waiting for a top sponsor to give you an answer and they need a couple of days. As long as you're still on track for mailing the invitations four to five weeks before the event, you can delay printing the invitations. Timelines are also very useful in drafting meeting agendas, and budgets are most helpful if they include revenue goals as well as expenses.

One of the most important roles of a special events consultant is to free up your staff by taking the special event function out of your office. Consultants must be extremely organized, detail-oriented, and resourceful, since they take over tasks such as maintaining the event

database of revenues and guest names, coordinating the committee and board members, word processing solicitation and acknowledgement letters, overseeing production of printed materials, and using their office to receive reservations and information calls. Taking over these tasks leaves the organization time to do their other fundraising.

After producing nonprofit and political special events for more than 18 years, my own insights about the fundraising arena many times prove to be the best advice available to my clients, who often don't have experienced development staff. Clients often comment on how we've enabled them to focus where previously they hadn't had enough time, such as soliciting prospective sponsors, telephoning their most cherished donors, and writing personalized notes.

Typically, we also share our professional resources with clients, from gathering competitive bids from vendor contacts to sharing contacts for pro bono photographers

**Here is a quick checklist of many of the services that a typical special events consultant should be expected to cover:**

- Timeline development
- Budget development
- Venue search
- Theme brainstorming
- Committee development
- Database analysis
- Sponsorship solicitation
- Printed materials
- Contract negotiations with venue/caterer
- Menu
- Entertainment
- In-kind donations
- Photography
- Volunteer recruitment
- Coordination of vendors
- Silent auction/raffle
- Script development
- Program participants: emcee, keynote
- Guest list for registration
- Thank you letters
- Confirm reservations for accurate count
- Table seating
- Record keeping of funds received
- Payment of vendors
- Follow-up unpaid attendees
- Database transfer
- Final accounting
- De-brief meeting

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or scriptwriters. I make it a point to work on lowering expenses wherever possible with completely in-kind donations or partial donations from vendors. Being able to get at-cost expenses for such things as wine and beverages, flowers, catering, printing, postage, entertainment, souvenirs, photography services, and silent auction prizes can generate a huge savings. On the other hand, it's important not to nickel-and-dime every little expense. For example, it may make sense to spend \$17 on a messenger to deliver invitations to your honoree instead of sending your Executive Director on that errand.

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### THE LANGUAGE OF EVENT-SPEAK

Another advantage that a special events consultant brings to your organization is aptitude in the language of special events. "Event-speak" is composed of sub-languages such as "catering-speak" and "printer-speak." Upon entering the world of special events, I encountered phrases such as "plus-plus or inclusive," "classroom style," and of course "PMS colors," all foreign concepts at the time.

I quickly learned to speak the languages of graphic designers, printers, mailhouses, audio-visual equipment providers, and caterers. Your consultant will help guide you through the process of producing your printed materials, choosing your menu items, negotiating prices for a video projector and screen, and setting up your registration area, among many other tasks. They will also help you avoid some of the pitfalls that potentially trap or sneak up on organizations, such as being clear about all costs before signing hotel contracts, or anticipating the weight of invitations so they receive the correct postage.

One final tip: If you're going to use a special events consultant, contact them early! A decent lead time would be eight months to begin preliminary conversations about availability, interest, and first steps. **GF**

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