



**LEGACY  
FOUNDATION**

**GIVE. LEAD. MAKE A DIFFERENCE.**

Spring, 2011

Dear Partners in Philanthropy,

As a friend of Legacy Foundation you may recall that our annual report was presented to you in the form of a binder this year. At different points in time I will be sharing some thoughts and tips with you regarding a wide variety of topics in the world of philanthropy.

Attached please find a copy of, “Top 10 Best Practices in Event Planning”. I hope that you download this and add it to your binder. Special Events seem to be ever present in the world of friendraising and fundraising, I highly recommend that you review the points listed in the attached as you consider your next event.

Give to live,

A handwritten signature in black ink, appearing to read 'HJV III', with a long horizontal flourish extending to the right.

Harry J. Vande Velde III

Ps. I am proud to share with you that the author of this list is my daughter, Emily Szy, a Special Events Manager with the Cleveland Symphony Orchestra.



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## Top 10 Best Practices in Event Planning<sup>1</sup>

1. **Purpose of event** – defining the purpose and function of an event at the start of the planning process is crucial. This will mold the event, aid in the creative ideas process, and give the event a true intention.
2. **Importance of A-Z Organization** – Staying organized from start to finish will lead to seamless transitioning in planning processes.
3. **Creativity to Concept** – all ideas, at one point, are good ideas. It's important to weed out what is just creative and catchy in order to maintain the purpose of the gathering. One idea may turn into reality or can be brought back to the drawing board for the next event.
4. **Budget, Budget, Budget** – setting a dollar amount and sticking to it is the cardinal rule of event planning. Communicating the budget to vendors from the first meeting will ensure that they have something concrete to work and their proposals won't come back as a shock.
5. **Over planning** – Attention to detail is important, but there is a fine line between being detail-oriented and paying too much attention. If you find yourself focusing too much on details and not enough on the big picture, make a list and reprioritize what is truly essential.
6. **Benefit fulfillment** – based on the donors or supporters level of giving, and the benefits they receive for that support, they are bound to receive several invitations in a fiscal year. Making events meaningful and more tied to the mission statement of the organization is more important than feeding a crowd over and over again.
7. **Invitation saturation** – Do you see the same names over and over again on invitation lists? Based on giving and benefit levels, donors will receive invitations several times per year. Scale back paper invitations by using an e-vite website and track RSVP's electronically. Try [paperlesspost.com](http://paperlesspost.com).
8. **Staff and volunteer collaboration** – Volunteers and committees are excellent tools to touch people you may not know or touch those who you would like to further engage. Setting expectations with volunteers from the start in terms of budget, theme, and scope of the event will focus their expectations so you won't have to manage their ideas and involvements for the duration of the planning.
9. **Friend-raiser or fund-raiser** – Raising friends or raising funds can be a constant struggle and balance when planning an event. Once you cross over the .30 to raise a dollar ratio you are on a slippery slope towards managing a friend-raiser, and there is absolutely nothing wrong with developing a friend-raiser. Make sure you control Board and committee expectations for the event, discuss this early on in the planning process.
10. **Have Fun** – Events can be difficult, stressful and time-consuming. But they can also be fun, especially when their outcome not only impacts your bottom line but those who came to the event as a patron and walked away with an exceptional experience.

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<sup>1</sup> "Top Ten Best Practices in Event Planning". Emily G. Szy, Development Associate. Cleveland Symphony Orchestra.