



FOUNDATION FOR
SARCOIDOSIS RESEARCH

THIRD PARTY EVENT HANDBOOK

ORGANIZING AN EVENT

AN OUTLINE:

1. **Define your goals**
 - ☐ Establish a planning committee
 - ☐ Brainstorm event ideas
 - ☐ Set the date/time
 - ☐ Develop a timeline
 - ☐ Secure a venue/location (including permit, if needed)
 - ☐ Establish event budget
 - ☐ Set fundraising goal
 - ☐ Identify and assign tasks for committee members – Delegate!
2. **Send *Third Party Event Application Form* to FSR**
3. **Promote your event**
 - ☐ Create invite list
 - ☐ Send out invitations and announcements
 - ☐ Post information at local businesses or online
 - ☐ Alert local newspapers
 - ☐ Invite local officials and celebrities
4. **Plan/Finalize event logistics**
 - ☐ Plan decorations and favors
 - ☐ Determine menu/refreshments
 - ☐ Secure entertainment and other vendors

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www.stopsarcoidosis.org

- ☐ Request educational materials from FSR
- ☐ Solicit donations of items to be raffled or auctioned off
- ☐ Secure volunteers
- ☐ Finalize program

5. After the event

- ☐ Send thank you notes and receipts to guests and donors
- ☐ Write thank you notes and final payment to any vendors
- ☐ Organize your notes, contracts and other paperwork into a reference folder
- ☐ Send the proceeds to FSR
- ☐ CELEBRATE! You did it!

This list is intended to provide a framework for planning your event. You may find that you need to add additional steps beyond what is listed above or that some of the list is not applicable for your event. If you have any questions, please contact FSR!

A CLOSER LOOK:

1. Define your goals

☐ **Establish a planning committee**

Planning an event can be more fun with help from others. Ask if others are interested in being on a committee. Communication is the key to a successful committee experience. How often will you meet? Will you hold conference calls or communicate by email? Make sure that all committee members have each other's contact information. Remember, as you go through the event planning process, it is important to involve all members of your planning committee in the decision making.

☐ **Brainstorm event ideas**

Brainstorm a list of event ideas that will help you attract the audience you want to attend your event. Remember, brainstorming means throwing out as many ideas as possible before you begin to evaluate which ones are best or feasible for your group to handle. Possible options include a golf outing, bake sale, car wash, wine tasting, dinner party, a pancake breakfast, or spaghetti dinner.

Once the group is done thinking of new ideas, begin to evaluate each idea. Consider your talents, likes and dislikes in determining what kind of event to hold. Keep in mind the amount of time that you have and the expenses that are associated with each type of event. A gala event is more expensive and takes longer to plan than a bake sale. Be realistic about your timeframe. Also, consider your audience. What type of event will appeal to your friends and family and others in the community? A wine tasting event will appeal to a different group of people than a car wash.

☐ **Set a fundraising goal/Establish event budget**

Establish a strict budget early on so that you can set goals for the number of attendees, the number of donations, sponsorships, etc. that you'll need to get.

Try to think of everything you might spend money on. Will there be costs associated with the event site such as rental fees or permits? Do you want to offer participants a thank you gift or t-shirt? Or will you need to rent tents and portable toilets? Take a look at your budget to see what pieces you might get donated from supporters or businesses in your area. For instance, hospitals and businesses are often willing to donate items for a goodie bag to be given to each participant.

You don't need to know exactly how much everything will cost, but a key part of planning a fundraising

event is to make sure that your costs are as low as possible relative to the money raised! Try to keep expenses as low as possible in order to raise more money!

☐ **Set the date/time**

Select a few possible dates on which you might hold your event. Check community calendars to make sure that your event does not conflict with other major events or holidays. Verify that your committee members are also able to be there for your event! Consider how much time you have to devote to the planning of your event between now and event day.

☐ **Develop a timeline**

Working backward from the date of your event, develop a timeline including tasks both big and small. Set deadlines for completing each of these activities. For example, if you are planning to mail invitations, they should be mailed 3-4 weeks before the event. Based on this, when do you need to have the invitation list completed? How much time will it take to address and mail the invitations? Will you need to send a save-the-date? Will your event involve working with vendors such as caterers or entertainers? Set a target date for when you plan to have these contracts confirmed.

By creating target dates of completion, you'll ensure that these tasks aren't neglected. There are few things more satisfying as an event draws closer than crossing tasks off your list. A good rule of thumb is to begin planning at least six months before the event is to take place, longer if you're planning a bigger event.

☐ **Secure a venue/location (including permit, if needed)**

Select a venue that offers affordable options for your event. Make sure that it can accommodate the number of people you expect to attend. If you are planning a walk-a-thon or a similar event, check with your town government to determine if you'll need to apply for a permit to use the park or other public area.

Keep the costs low and use facilities that are available at little or no charge. Use your committee members to help find social, cultural, athletic or religious venues which will provide a space free of charge. You may find a church or community center that will let you use their parking lot or indoor gathering rooms for free.

☐ **Secure sponsorships and corporate donations.**

Consider your local business and corporations who might be interested in sponsoring your event in return for including their name and business information in your promotional materials or at your event.

Sponsorships don't always have to be a monetary donation. Maybe a party supply store will donate the necessary supplies in exchange for putting their logo on the invitations. Or perhaps a local newspaper will offer free advertising space in exchange for being listed as a sponsor of the event.

☐ **Identify and assign tasks for committee members – Delegate!**

Even though it may seem more convenient or simpler to do everything yourself, sharing responsibility builds investment and commitment to the event and the group.

Identify specific people to coordinate such tasks as venue selection, program and publicity. Ask those who coordinate each task to keep a written record of what they do so that at the end of the event you can put together a notebook of what worked and what didn't. Your notebook will be a handy tool for planning your next event, whether you've passed on the leadership to someone else or you decide to plan another event yourself.

Make sure that committee members communicate with each other regularly so that everyone is accountable, stays on task and is updated about the latest developments.

2. **Send *Third Party Event Agreement Form* to FSR**

Complete the form in the Attachments and return by mail or email.

Foundation for Sarcoidosis Research
1820 West Webster Avenue, Suite 304
Chicago, IL 60614

Email: info@stop sarcoidosis.org

3. **Promote your event**

☐ **Create invite list**

Decide who will be invited to the event, and how – mail, email, flyers? Collect address and email addresses. Think of everyone you know - friends, family, physicians, co-workers, church members, neighbors, clients, neighborhood restaurants, etc. Enlist other friends and family to help spread the word about your efforts! The more people you contact, the easier it is to reach your goal! Do not make the decision for others thinking “they won’t want to come.” You never know! You will be surprised by your results, and your contacts will feel privileged to help with such a worthy cause!

If you are planning a walk or other event that will require registration, develop your registration and pledge forms. Template forms are available in the Attachments.

☐ **Send out invitations and announcements**

Following your timeline, prepare your invitations and send them out. Make sure to include on the invitation that proceeds will benefit the Foundation for Sarcoidosis Research. Make sure the invitation includes the time, date, location and cost. Don’t forget to include the information about registering or how to RSVP.

Do you want to send a follow-up email or a reminder postcard after the invitation has been sent out? Sometimes people need a reminder before they will commit to invitations. Don’t be shy!

☐ **Post information at local businesses or online.**

It is a good idea to assign publicity and media relations to one or more of your committee members. Depending on the size of your event, you will want to consider print advertising in your budget. You may need to print posters and flyers to display in community areas such as community centers, libraries, schools, or workplaces. Contact local businesses that you frequent such as your local grocery store, coffee shop or dry cleaner to find out if they will display a sign or poster for your event in their window. Post information on Facebook, Twitter or other social media. Include information on how people can find more information by giving your phone number or email address or the address of your Facebook page.

Email details about your event to FSR so that your event can be posted on the Current Events page of the FSR website (info@stop sarcoidosis.org).

☐ **Alert local media**

Many local newspapers keep calendars of events going on in the community. Contact your local paper to find out how to submit a calendar listing to be printed in the paper or included on their website.

Newspapers like to tell 'human interest stories' – stories about their readers' triumphs over struggles or efforts to benefit the community. This not only spreads the word about the event, it educates people about sarcoidosis.

Write a press release to alert media of your event, and send it to local media outlets.

For tips on writing a press release, visit:

- http://www.ehow.com/how_8793_write-proper-press-release.html
- <http://www.prlog.org/tips/1016-how-to-write-a-press-release.html>

Many communities have local cable access channels which are looking for events like yours to highlight.

☐ **Invite local officials and celebrities**

Reach out to local television personalities, newscasters and other local elected officials to invite them to participate in the event. Perhaps they'd like to be the Master of Ceremonies or maybe you could present them with an award for their efforts on behalf of your cause.

4. Plan/Finalize event logistics

☐ **Plan decorations and favors**

Think of the experience that you want your guests to have at the event. Do you want to have information to educate them about sarcoidosis? Will you have balloons and streamers or flowers or votive candles? What do you want the atmosphere to be at the event? Make sure that you've accounted for decorations and favors in your budget – and stick to it!

☐ **Determine menu/refreshments**

What food or refreshments will you provide for your guests? If you're planning a walk, will you have water and snacks for people as they finish? What time is your event – will your guests be hungry for a meal or only for small appetizers? Consider your budget when planning the menu. Can you find a local business to donate any of the refreshments? Maybe the committee members will each be able to bring drinks or appetizers to keep the costs down.

☐ **Secure entertainment and other vendors**

Will there be entertainment at your event? Maybe a band or a DJ would be interested in donating their services. Perhaps all you will need is an iPod or some CDs. Plan ahead and make sure that any entertainment costs are included in your budget.

Will you order flowers or flower arrangements from local florists? Are there other vendors that you'll need to secure – Audio/Visual experts, security, tents, portable toilets for outside events, etc?

Make sure you have a contract with all of your vendors. Contracts allow both parties to know exactly what they can expect and what is expected of them.

☐ **Request educational materials from FSR**

FSR is able to provide KISS awareness wristbands and educational brochures for you to distribute at your event. Because there is a cost of these items to FSR, we ask for you to fill out the Consignment Agreement included in the Attachments. When you consign materials from FSR, you are agreeing to purchase the materials from FSR or return the unused materials.

- ☐ **Solicit donations of any items to be raffled or auctioned off**
Will your event include a raffle or a silent auction? Ask local businesses to donate an item to be included. A template letter and a donation form is included in the Attachments.

If the item will be used in a silent auction, set a minimum bid that's about 1/3 of the value of the item and set an appropriate minimum bid increment. (A template bid sheet is included in the Attachments.) Make sure that any restrictions, including expiration or black-out dates, are listed so that people purchasing raffle tickets or bidding on items are aware of them. At the event, make sure that you thank the donors of the items.
- ☐ **Secure volunteers**
Will you need volunteers to help set-up the event, prepare goodie bags or help at the event? Make a list of what tasks and jobs you will need help with, and ask committee members, friends and family to help at the event. You may want to create a schedule of shifts so that volunteers are able to enjoy the event and don't feel like they are stuck in one place all night. Don't forget to designate a volunteer as a photographer!
- ☐ **Finalize program**
Will there be a presentation or announcements made during the event? If so, write out your remarks and determine when during the event the remarks will be made. Do you want to hand your guests a program booklet when they arrive or place a copy on the tables (if a meal will be served)?

5. After the event

- ☐ **Send thank you notes and receipts to guests and donors**
It is important to thank guests and donors for their support of your event. Tell them how much their support means to you and to people affected by sarcoidosis. Provide a list of guests and donors to FSR, and we will send a thank you letter and provide a receipt for their contributions. Use the Revenue-Expense Tracking Sheet provided in the Attachments. FSR does not share, sell or otherwise compromise our donors' privacy.
- ☐ **Write thank you notes and final payment to any vendors**
Even if you are paying vendors, it is important to thank them for their participation in your event.
- ☐ **Organize your notes, contracts and other paperwork into a reference folder**
Collect your notes and the notes of committee members into a reference folder or binder. If you plan to have an event in the future, this is a very important step in planning future events.

Your folder or binder should include:

- ☐ copies of all contracts
 - ☐ contact information for all committee members, vendors and suppliers
 - ☐ the final menu and program
 - ☐ a list of all donors, guest and sponsors (so that you'll be able to easily ask them to renew their support next year)
 - ☐ the final budget worksheet
- ☐ **Send the proceeds to FSR**
Send the proceeds to FSR. If checks are made payable to the Foundation for Sarcoidosis Research or FSR, send them to FSR for deposit. If a supporter makes the check payable to you, simply endorse the check with your signature, write "Payable to the Foundation for Sarcoidosis Research," and send it with the others to:

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Make sure to include the Revenues-Expenses Tracking worksheet that shows an accounting of event revenues and expenses. Don't forget to make a copy for yourself!

- ☐ **CELEBRATE! You did it!**
You are an important part of FSR's success.

THANK YOU!