

Suggestions for Initiating a Docent-Led Fundraising Event

A fundraising event can be an exciting way to accomplish several goals. It can provide funding for activities, like attendance at the National Docent Symposium, that the institution cannot afford. Raising money, however, is only one purpose of a fundraising event. Other purposes may be to establish an esprit de corps between docents and staff, to build awareness and visibility of the institution, to involve and encourage volunteers, to build morale, to attract new members, and so on. Every institution and every fundraising event is different. The following outline is not intended to fit every institution or type of fundraising event, but we hope it will suggest some ideas that are useful to you.

CONCEIVING THE IDEA OF AN EVENT

You may want to begin with a small group of docents with leadership abilities to initiate a discussion on whether or not to start a fundraising event. Questions they may consider are:

- What is the principal reason we want to do this?
- How much money do we hope to raise? [You may want to begin with a modest amount for the first event.]
- As docents, what are our goals?
- Are our goals and expectations realistic?
- As an institution, what is our distinctive competence?
- As a group of docents, what are our strengths? Weaknesses?
- Do we wish to engage specific audiences? Is this the best way to attract them?
- Have we had an event in the past that could be revised and improved?

Brainstorm possible alternatives for fundraising. Be creative. Formulate a rough draft [tentative plan] to share with colleagues, such as Docent Council. Here are some sample questions you may address as you refine your concept.

- Do you like the tentative plan? How would you revise it?
- What will be the event format?
- What facilities are available?
- Is the proposed event format consistent with our mission as docents? With our goals as docents? With the mission of the institution?
- Does the proposed event format promote the institution's image?
- How should we communicate to the docents-at-large, and engage them? How will we motivate them to get involved?
- What are strengths of specific docents: leadership, grant writing, development, design expertise, artistry, financial planning, etc.?
- How do we communicate with the appropriate staff? Do we need their approval to begin? Will a staff member be a consultant to the project?
- How will we coordinate with the museum's development office, as they may be able to help.? Is there another event sponsored by the institution that may conflict with this event?.
- What are potential problem areas?
- Are we ready to say that we will move ahead with the fundraising event?
- Is there enthusiastic support among constituent groups (board, staff, docents) for an event?

Put into writing the skeleton of the plan. Communicate it to docents and staff involved. Seek all necessary approvals.

ORGANIZING AN EVENT

One of the first tasks in organizing an event is recruiting an Event Chair/ Co-Chairs and finalizing the date, location and the event theme. The Chair/ Co-Chairs will be responsible for establishing the Committee Structure. Generally speaking, committee structure for a fundraising event falls into three main areas:

- (1) Fundraising / Revenue Generating
- (2) Logistics/ Operations
- (3) Marketing/ Printing

Fundraising/ Revenue Generating: Includes Solicitation List Development, Solicitations, Budget, Underwriting, Sponsorships, Host/Hostess, Raffle, Silent and Live Auctions, Allocations, etc.

Things to consider under Fundraising/ Revenue Generating:

- Who will serve on the fundraising committee? Leadership roles?
- Do we have adequate job descriptions for them?
- Do we have a chain of command? Who reports to whom?
- Do we have "need to know" boundaries established? Is there someone (or multiple people) who should be copied on all communications?
- Do we have a schedule for committee meetings?
- How much will it cost to stage the event? Cost per person?
- Do we have an adequate budget?
- What is a realistic ticket price?
- Are our solicitation lists updated? Are lists refined to likely donors?
- Do we have set talking points to use in all solicitations?
- Do all our solicitation letters and communications carry out chosen theme and color palette?
- Do our solicitation letters communicate the message and image you wish to project for the institution?
- Do we have a timeline for solicitation mailings and follow-up?
- Will we solicit money from grants?
- Are any donors off-limits from the administration? Did we clear this with Development Dept.?
- What type of account will we use? Who will control it?
- Do we need an Allocation Committee?
- Will staff be assisting in any ways? (Example: Donor Lists)
- Are we building relationships and making inroads for future fundraising?
- Are we building a bridge to younger people?

Logistics/ Operations: Includes Facilities, Food and Beverage, Entertainment, Décor, Lighting, Rentals, Volunteers, Audio-Visual, Parking, Security, etc.

Things to consider under Logistics/ Operations:

- Who will serve on these committees? Leadership?
- Do we have adequate job descriptions for them?
- Do we have a realistic timeline and deadlines?
- Do we have a schedule for meetings?
- What facilities are needed? Do we need permission to use them?
- Have we established the design elements and color palette to carry out theme and set tone?
- Does our décor plan carry out this theme?
- Does our entertainment plan carry out this theme?
- Is the layout plan for the site guest friendly? Can guests easily find and access food/ bars/ restrooms?
- How many volunteers will be needed?
- Will staff be assisting in any way? (Ex: facilities, special events staff)
- Is valet/parking possible and adequate to handle anticipated numbers?
- Is security adequate to handle anticipated numbers?
- Have we assessed all rental needs and confirmed numbers with vendor?
- Do we have “need to know” boundaries established? Is there someone (or multiple people) who should be copied on all communications?
- Is flexibility built into the plan in case of weather, etc.?
- Do we know our audio visual needs?

Marketing/ printing: Includes press coverage, community announcements, social media, save the date (hard copy and digital) invitations, mailings, programs, photography, signage, etc.

Things to consider under Marketing/Printing:

- Who will serve on these committees? Leadership?
- Do we have adequate job descriptions for them?
- Do we have a schedule for committee meetings?
- Do we have “need to know” boundaries established? Is there someone (or multiple people) who should be copied on all communications?
- Are our mailing lists for invitations purged and updated? Mailing Lists are crucial!
- How can we use social media?
- Who will take charge of social media and keep it continually updated?
- Do we know the guidelines for submitting print material to local publications?
- Is the format of the event interesting enough that it will invite the all-important press coverage?
- Do we have a timeline that reflects print, press and media deadlines?
- Do all communications carry out chosen theme, design elements, color scheme and talking points?
- Do all communications promote the institution’s mission and image?
- Are sponsors adequately acknowledged on invitations, publicity and signage?
- Are sponsors adequately acknowledged in your on-site signage?

EXECUTING AN EVENT

It is strongly recommended that all pertinent Committee Chairs do a complete walk through of the venue site one to two weeks before the event. This will help uncover any last minute details that need to be addressed and ensure that you are ready. Other questions to consider are:

- Is a schedule established for all vendor deliveries?
- Is a schedule established for set-up in all areas?
- Is a schedule established for what occurs during the event and where it occurs?
- Are all volunteers informed and reminded of when and where they are working?
- Have we provided cell phone numbers of those in charge the day/night of the event to all staff and volunteers working the event?
- Has the head of security been informed of delivery, set-up and event schedules?
- Do we have a plan to ensure that guests feel welcomed and comfortable?
- Do we have volunteers ready to assist with problems and unforeseen happenings?
- Is it easy for guests to identify docents, volunteers and staff who are working?
- Do we have a plan to ensure that food and bar service is working well during the event?
- Do we have a plan to ensure that clean-up is functioning well during the event?
- Do we have a clear exit plan for guests?
- Do we have a plan and designated volunteers for clean-up and close-down following the event?

EVALUATING AN EVENT

Determine beforehand who has the responsibility for calling a follow-up meeting of all committee heads to evaluate the event. Questions they may consider are:

- Did our guests enjoy the event?
- What parts of the event were most interesting to them?
- Did the floor plan layout work? Were guests easily able to access food and bar? Were there complaints about too long lines, etc.?
- Did we utilize docents' skills and interests?
- What was the esprit de corps among docents? Between staff and docents?
- Did we meet our financial goals? Why or why not?
- Do we want to sponsor another event?
- Will we expand our goals and create a more expansive/ expensive event?
- Did any conflicts occur that we did not resolve?
- Do we want to change any activities?
- Did we ensure that everyone has been appropriately acknowledged and thanked?
- Were thank you notes sent out in a timely manner?
- Did we make inroads for future? Did we reach out to new constituent groups?
- Did we attract a range of age groups?
- Did the event project and promote the institution's image and mission?

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