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Fundraising Fundamentals

What is the difference between a Program and a Fundraising Event?

There is a difference between a Program and a Fundraising Event.

Program: The purpose of a program is to develop relationships and build membership in a more business type setting. A program occurs when you have a speaker, a panel discussion, or a tour. If industry members find your event informative and educational, it is a program. A **program should cover its costs** and maybe have proceeds of 5-10%.

Fundraiser: The purpose of a fundraiser is to be profitable and make money for Scholarship and Education. Optimally, Chapter **proceeds should target 40% net proceeds**. If upon developing a fundraiser, your anticipated proceeds are lower than 25%, it should be tweaked or cancelled.

Happy Hour events are neither a program or a fundraiser as they are not required to have any proceeds, no speakers or tours are necessary. You have not contracted with a venue to provide a special room, etc., for a Happy Hour type event.

Form a Fundraising Committee

- Review plans and budget with Chapter Board for review / approval as appropriate.
- Lead Chapter committee meetings and participate with emails as needed.
- Assign the committee members task-specific items with deadline dates.
- Keep the committee engaged by having regular committee meetings, ensuring all planning for the event is on schedule.

Important Financial Notes

- Chapter funds cannot be used for any other charitable purposes.
- Chapter state regulations and filings are conducted through the NEWH, Inc. Office. Contact the NEWH CFO, Susan Huntington (susan.huntington@newh.org), for further information. Confirm with the NEWH Inc. Office if your Chapter is tax-exempt in your state.
- **Note on Raffles/Auctions:** Total dollars taken in for raffles/auctions is not included in your total income for a fundraising event. These are fundraising dollars and need to be reported to NEWH, Inc.
 - Be sure to know your state guidelines/restrictions regarding raffle sales. Contact the NEWH CFO, Susan Huntington, for help with that.
- All NEWH sponsors are to receive a thank you letter stating our Federal Tax ID Number and if they received any goods and services for their donation along with the **FAIR MARKET VALUE** of the goods and services received.
- Check here for a [Clarification of the By-laws Regarding Fundraising Proceeds](#)

- Check here to learn more about the [Financial Requirements of Fundraising](#)

Important Notes Regarding Fundraising Events

- At least one fundraising event is required each year.
- If your Chapter is holding a tradeshow, which counts as your Chapter's main fundraising event, you can forgo a major fundraising event for that year.
- If holding a huge event every year is too much, consider having a large fundraising event every other year, with a 'mini' fundraising event on the other years.

Fundraising: Steps to Plan the Event

Plan the Event

With the Fundraising Committee, Plan the Event

- Create a timeline. View Sample Timelines
 - [Planning Event Roadmap - 3-4 Months Out](#)
 - [Planning Event Checklist - 12 Months Out](#) Here is a list that will help.
 - [Fundraising Sample Timeline for](#) all stages of implementing the fundraiser.
- **Select a theme, date options, and possible venue sites for the event.**
 - Listen to your demographics.
 - What kind of event would people be attracted to in your area?
 - Survey past event attendees to find out what they liked/didn't like about your event.
- Ensure event date does not conflict with national/regional tradeshow or other organization events that would be a conflict for your attendees.
- Tour possible venue sites; determine location.
- Select catering. Use the [Catering Checklist Tool](#) to help determine catering needs.
- Select decorations.
- Select entertainment.
- **Establish the Fundraising Event Budget**
 - Utilize the [Budget Calculator Tool](#) to ensure you include all items in developing your fundraising budget.
 - **Regional Groups:** Complete a [Pre-Event Budget Form](#). This needs to be approved by the NEWH, Inc. Office prior to any marketing/email broadcasts that are sent.
 - NEWH, Inc. expects its Chapters to target a 40% net profit on their fundraisers. Upon developing a budget for the fundraising event, if your anticipated profit is lower than 25%, it should be cancelled or revised.
 - Get bids for venues, food, drinks, entertainment.
 - Establish admission fees, sponsorship levels and amounts.

- Set member vs nonmember price. Create a price difference to make it apparent that NEWH membership has value.
- Keep accurate records of all income and expenses. Use the [Budget Analysis Tool](#) to help with the analysis of income and expenses.

Special Considerations

- **Signing Contracts.**
 - Chapters are allowed to sign only non-recurring contracts. Multi-year contracts must be approved and signed by the NEWH, Inc. CEO. Contact the NEWH, Inc. Office at 800-593-6394 with any questions.
 - Review:
 - [Contract Review: The Definitive Checklist.](#)
 - [4 Dangerous Contract Clauses.](#)
- **Obtain a Certificate of Insurance.**
 - 3 weeks prior to the event, contact Susan Huntington in the NEWH, Inc. Office to obtain a Certificate of Insurance (COI). Each COI is \$50. Learn more about event insurance with this explanation of [Insurance Coverages](#)
- **Obtain necessary Waivers.**
 - [Waiver Of Liability and Hold Harmless Agreement](#): If holding a special or unique event that may have any risk (hard hat tours, etc.), please use the attached waiver to indemnify NEWH, Inc.
 - [Waiver / Acknowledgement of Donation \(Graphics\) Agreement](#): If having graphics created for an event at no direct charge to the Chapter, ask the individual/firm to sign this agreement to acknowledge the graphics as a donation.

Designing Event Materials

- Follow the [NEWH Logo/Branding Guidelines](#). If you have any questions on the logo policy, please contact the NEWH, Inc. Office.

Sponsorships

Enlist sponsors to underwrite the event.

- **Types of Sponsorship**
 - There are different types of sponsorships to consider for events (Corporate, In-Kind and Event). Learn more with a review of [Types of Sponsors](#).
- **Establish Sponsorship Levels**
 - Fundraising should begin as soon as the budget is set for the event and sponsor levels are established, ideally 6 months out from the event.

- If available, present the sponsorship levels for both fundraisers and programming events to potential sponsors in October while company budgets are being set. If sponsorship levels are not available, post the event calendar on the Chapter website so potential sponsors can earmark money for the event.
- Review benefits being offered to attract high quality and high-level sponsors. Note other Chapter sponsorship levels and benefits for benefits ideas and creativity. [Check out these sponsorship examples.](#)
- **Solicit Sponsors**
 - Give potential sponsors a heads-up for the year and send out an **Annual Sponsorship Menu** with exclusive sponsor opportunities/benefits. See [additional sponsorship examples](#). Looking for sponsors outside of the box? Use the [Donation Letter Template](#) that is tailored to getting other local businesses involved.
 - Promote and develop relationships with vendors and other possible sponsors.
 - Members and previous sponsors are a good source to develop potential sponsors and maintain existing sponsors.
 - Look to different avenues as a source of potential sponsors to include hotels, A&D vendors, restaurant operations and other firms associated with the hospitality design community.
 - Offer first rights of sponsorship to NEWH Corporate Partners. Email the flyer or information to jena.seibel@newh.org
 - Need to solicit sponsorships? See [Sponsorship Letter Template](#) and tweak to fit your needs!
- **Market Sponsorships**
 - Provide sponsorship flyer for NEWH, Inc. to broadcast.
 - Offer a discount on sponsorship to NEWH Corporate Partners.
 - Offer past sponsors first chance at sponsorship as a courtesy.
 - ALWAYS remember to mention and thank Corporate Partners at event.
- **Sign up the Sponsors**
 - Use the [Sponsorship Agreement template](#), a standard agreement and payment/invoice that can be tweaked for Chapter events.
- **Thank the Sponsors**
 - Whether a big \$\$ sponsor or an auction donor, remember to thank your contributors! Graciousness to your sponsors will ensure they will contribute again. This letter meets the IRS requirements for all type of donors. For templates, see [Sponsor Thank You](#) and [Auction Donor Thank You](#).
 - ALWAYS remember to mention and thank Corporate Partners at the event.
 - Be sure to recognize event sponsors on the invite, social media and at the event.

Set Ticket Prices and Create a Cancellation Policy

- Have a difference in ticket price being a member vs. nonmember; make it apparent that NEWH membership has value.

- Courtesy Tickets for Corporate Sponsors.
 - 3 levels of NEWH Corporate Partnership (\$18,000 - \$38,000 cost per year)
 - Benefactor - 5 partners: receive 20 courtesy tickets to use for the year/not per event.
 - Patron - 10 partners: receive 10 courtesy tickets to use for the year/not per event.
 - Supporting - 25 partners: receive 5 courtesy tickets to use for the year/not per event.
 - Requests to use a Corporate Partner courtesy ticket generally comes from the main contact of the partnership to Jena Seibel. Jena then forwards the completed request form to the contact of the event for the Chapter with instructions and information.
 - If a request is received at the local level, please email Jena (jena.seibel@newh.org) or phone 866.935.6394 and Jena will confirm with the Corporate Sponsor contact if the request can be honored.
 - Chapters are reimbursed for these courtesy tickets (by NEWH, Inc.) the fair market value + 10%, or member ticket cost, whichever is lower.
 - It is mandatory to offer individual tickets not offered with additional sponsorship for all fundraisers.
- Create a [cancellation policy](#) for sponsors and participants See the

Market the Event

- Coordinate with Marketing Director, and the Public Relations, Publications, and Social Media Chairs for maximum press coverage opportunities.
 - Complete this [list of event information](#) to share with those responsible for social media posts and marketing the event!
 - Post on social media sites.
 - Include upcoming date and write-up in Chapter newsletter.
 - Talk it up at regular Chapter events.
- Submit date to NEWH, Inc. Office for inclusion on website.
- Keep Chapter mailing list current by forwarding any new or revised contact information to the NEWH, Inc. Office to update the master list.

Prepare/Send the Save the Date Invitation

- General information for a Save the Date invitation should include type of event, date/time, and location if known.
- Submit approved Save the Date to Diane at the NEWH, Inc. Office for email broadcasting to your Chapter mailing list; give NEWH, Inc. Office 2-3 business days lead time for broadcast requests.
- Broadcast the 'Save the Date' at least 4-6 weeks prior to the event.

Prepare/Send the Event Invitation

- Ensure all pertinent information is included on the invitation (date, time, location, ticket cost, fair market value, event sponsors, etc.).
- Be sure to have a difference in ticket price being a member vs. nonmember; make it apparent that NEWH membership has value.
- Fair market value statement must be provided prior to RSVP payment set-up online; it will appear on the event RSVP page. *“The Fair Market Value of this event is \$xx and may be tax-deductible as a business expense. The remainder can be considered a charitable contribution.”*
- If applicable, request NEWH, Inc. Office to set up online RSVP/payment.
- If RSVPs are online, Julie Hartmann checks membership against ticket purchased, ensures payment went through, contacts individual directly if any questions or issues, sends attendee list prior to event.
- Broadcast invitation with all event specifics 3-4 weeks prior to the event with necessary RSVP information.
- Encourage people to RSVP early. Think about early bird specials, open event to members only first, first 30 come for discounted rate, etc.
- Be sure NEWH Inc. Office is aware of any promotions for the event (ticket sales, sponsor courtesy tickets, etc.).
- Email broadcasts – 2 free per event – get a Save the Date out early!

Reminding Chapter Members about an Upcoming Event

- Reaching out to Chapter members to remind them about an upcoming event is important! Here is an example of the Washington DC Chapter’s approach to communication: [Communications via Core Groups](#) and [Core Group Script for an Event](#).

Fundraising: Steps at the Event

At the Event

- Collaborate with Hospitality Committee Chair for preparing and holding the event.
- Corporate Sponsors should be showcased at the event! Be sure to have the current corporate partner banner displayed or display this [PowerPoint](#) in the background of your event that includes all of our CP logos! Here is a [PDF of the Corporate Partner logos](#).
 - Corporate Partners should receive priority seating at all events which include seating.
- Event Badge Templates

- Make event attendees feel special! Print off name badges for events with NEWH logo and special recognition. All use Avery 5395 labels. Templates available for [attendees](#), [corporate sponsors](#), [event sponsors](#), [members](#), and [guests](#)).
- Check-in Table
 - If RSVPs are online, a list will be provided by the NEWH, Inc. Office.
 - If collecting cash/checks/credit card information, be sure to keep in secure location. Collect all information needed to process credit cards!
 - If using GoPayment card app, ensure **BOTH** memo fields are filled in to identify what the purchase is for. The first memo field is for the purchaser so be descriptive. The second field is for NEWH, Inc. (abbreviations are fine, e.g. SFBA-tour = San Francisco Bay Area Hotel Tour).
 - Consider having these resources available at check-in table:
 - Laptop.
 - Member applications.
 - Current roster.
 - FACTS Brochure/Elevator cards.
 - Save the date flyers for upcoming events.

The Event

- Create a script for the event. Here is an [example](#) of a simple timeline of the evening, whose speaking and about what, etc.
- Check for proper audio/microphone equipment.
- Recognize Corporate Partners at the event with signage and recognition and “thank you” at the event!
- Thank all the Sponsors!
- Understand and follow NEWH, Inc.’s [Liquor Policy](#).
- Understand and follow [Event Photo Release / Attendance / Refund and Cancellation Policies](#).

Fundraising: Steps After the Event

After the Event

- Thank the sponsors on social media and with a thank you letter. Thank you letter templates:
 - [Sponsor Thank You](#)
 - [Auction Donor Thank You](#)
- Provide a [Results of Activity Report to Board](#) to the NEWH CFO (Susan Huntington) at the NEWH, Inc. Office within 45 days after the event.

- With online RSVPs, monies are accounted for and the NEWH Inc. Office reimburses the Chapter after the event. **Know the refund policy stated online, if you choose to do non-refundable tickets, be sure to put that on your invite.**
- Thank your committee members on a job well done!
- Post event wrap-up along with event pictures.