

Organizing Fundraising Event: A Qualitative Assessment of Project Plan in Save The Children Phoenix, Arizona

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Abstract

The role of different fundraising strategies in successfully implementing projects has been widely established in areas such as the planning and control of time, cost, and quality. This paper aims to highlight the role of the qualitative method in assessing the project fundraising event in a systematic and sequential manner. It suggests that being constantly aware of identifying the project, constraints, and requirements is valuable for the researcher, the knowledge obtained, and the participant. The discussion not only focuses on the implementation of the project but also focuses on the project plans that, in reality, measure the success of the project, such as scope, budget and cost, staffing, communication, quality, and risk. This fastidiousness and vigilance enhance confidence that this assessment closely reflects the reality of a fundraising event and will bring a higher possibility of project success.

Keywords

Qualitative assessment, Fundraising event, Project plan, Constraints, Arizona

1. Introduction

Organizing a fundraising event already means “we don’t have any money.” To analyze qualitatively the management and organization of fundraising event, this study will be utilizing volunteers and donations to raise money for the children’s organization Save the Children. This project was conducted in the Save the Children of Phoenix branch, Arizona.

The requirements needed for this study were to find funding, \$20.000 from non-profits and other sources to finance the event, work with sponsors for foods, beverages, and transportation services, find entertainments that are reliable and entertaining in the Phoenix market, consult

other event coordinators who have successfully run an event similar to this project, find a reliable and well-located venue (i.e. free parking), find the equipment needed for the event and to research and meet all requirements related to this project.

Some studies have elaborated the fundraising strategies in various events, with their own perspective on the social impact, management and constraints (Klingaman, 2012; Bray & Bray, 2016; Wendroff, 2004; Berger & Smith, 1997). In the case of Save the Children, previous studies also demonstrated some challenges in fundraising for this organization (Gnaerig & MacCormack, 1999; Montgomery, 2010; Baughan & Fiori, 2015; Baughan, 2014). The specifically desired fundraising of this organization to help children around the globe also attracted serious attention from scholars both in developed and developing countries in its ways to empower children. It is, in some ways, driven by the vulnerable nature of children from the negative effects of globalization, wars, and conflict (Gnaerig & MacCormack, 1999).

2. Methods

The method used in this study was qualitative in nature by assessing the organization and project management in a fundraising event in Phoenix, Arizona. Due to its qualitative nature, this research is carried out in a systematic and sequential manner by identifying, first of all, to define the project, constraints, and requirements. The results demonstrated were related to the implementation and management plan. It also showed the role of communications and staffing as well as the scope, budget and cost, media and promotion, quality, risk and event project close and evaluation.

To assess the project, this research was conducted in a location which can only hold 200 people at one time due to fire regulations and parking space availability in the area. The weather was good (95% chance of sun), so activities were planned outside also. We confirmed everyone regularly committed, hoping they would show up to provide an event.

Furthermore, we also elaborated a plan for the event. First, A week before the event, we confirmed to the non-profit, the sponsor for foods and beverages, the entertainment teams, and the owner of the venue. We checked the venue for security and readiness the day before the event. On the day of the event, we worked and cooperated with each other to make sure that the event would go well. After the event, we closed down the event, and each member updated their documents.

3. Results

3.1 Constraints

Project end date may be too short; staff availability; staff knowledge on services to ask appropriate questions to gather accurate information; Legal, liability and environmental factors; Actual cost may exceed the budget.

3.2 Implementation

- a. Before the event started, the security team made sure that everybody parked the cars in the right place.

- b. At the Entrance-Door, the security team checked every person’s belonging for security purposes.
- c. The sponsors for the food and beverages were responsible for the food quality and only served the eligible customers the beers.
- d. The security team controlled the room to be conducive and provided first aid during the event.
- e. The entertainment teams controlled the game to be fun and fair during the event.
- f. All the team cooperated with each other to make sure that the event went well according to the agenda.
- g. At the end of the event, the security team made sure that everybody would be going home safely.

3.3 Scope Management Plan

We collected funding from non-profit and other sources to finance the event. We worked with sponsors for food, beverages, and transportation services. The entertainment we provided was reliable and entertaining in the Phoenix market. We consulted other event coordinators who had successfully run an event similar to this project. From the consultation we had with other coordinators, we finally decided to use the bowling alley as a reliable and well-located venue.

Table 1. Project team

Position	Name	Responsibility
Project Sponsor	Randy Bulriss	Ensure the resources are in place, promote the project, and hold overall responsibility for the project’s success
Project Manager	Rudiyanto Tri	Implement a project management methodology, plan the project, execute the plan, project control, close the project
Assistant Project Manager	Jonathan Liamaa	Support the project manager roles in planning, executing, and closing the project
Communication Coordinator	Sabine Toure	Create public relations and marketing materials such as press releases, blog posts, and newsletters.
Staffing and Sponsor Supervisor	Olivia Afulani	Provide sufficient human resources that possess the talents, knowledge and experience required for successful work completion
Logistic Supervisor	Alexis Johnstonee	Support budget, personnel and varied resources necessary

3.4 Work Break-down Structure (WBS)

The work breakdown structures (WBS) needed to help the event more accurately and specifically define and organize the scope of the total project. The WBS helped with assigning responsibilities, resource allocation, monitoring the project, and controlling the project. It also made the deliverables more precise and concrete so that the project team knows exactly what has to be accomplished within each deliverable (Jones, 2007). This allowed for better estimating of cost, risk, and time because every person was able to work from the smaller tasks back up to the level of the entire project. Finally, the AWB helped to double-check all the deliverables’ specifics with the stakeholders and made sure there was nothing missing or overlapping (Figure 1).

3.5 Project Schedule

We created a project schedule in excel and word, starting with the deliverables identified in the project’s work breakdown structure (WBS). We identified the activities that need to be put in place to complete each deliverable. We assigned resources and activities to individuals based on

the subject matter expertise and task requirements to complete the event. Our method of estimating was top to down, and the main constraints were time, cost and quality (Brewer et al., 2006).

This schedule was readily available to the project team to view and make any contribution to resources assigned to the project tasks. The team had to agree on the schedule, individual and task assignments, the time period and activities involved. After accomplishing this, the project sponsor reviewed and approved the schedule to be carried out.

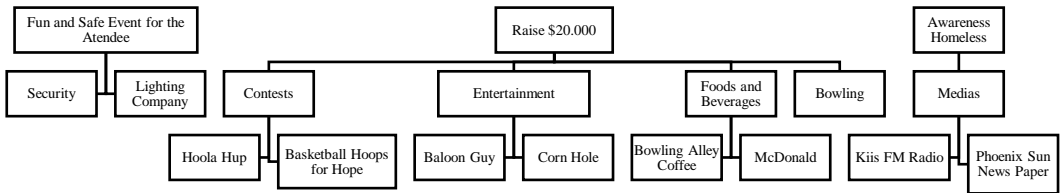


Figure 1. Work Breakdown Structure, Save the Children Phoenix, Arizona

3.6 Budget and Cost Plan

The project manager was responsible for managing and reporting on the project’s cost throughout the duration of the project. The project manager presented and reviewed the project’s cost performance for the previous month to all members during one of the monthly bi-weekly team meetings. The project manager was responsible for accounting for cost deviations. Any cost changes followed the project change plan, and the project sponsor had final approval. Costs were estimated down to each work package in the WBS.

3.7 Staffing Plan

Staffing and sponsor supervisor, together with the manager, make sure that the project was provided with sufficient human resources that possess the talents, knowledge and experience required for successful work completion. Roles, responsibilities and skills were the key elements that composed the plan, and we considered it with great care.

Table 2. Project Teams, Vendors, Sponsors, and Volunteers

Staff	Contact	Email	Status
Chairman of the Organization	480-246-588	coc@savethechildrenphx.com	Confirmed
Sponsor	480465-879	wjr@savethechildrenphx.com	Confirmed
Donation	480-789-357	fkf@savethechildrenphx.com	Confirmed
Volunteers coordinator	480-159-951	sie@savethechildrenphx.com	Confirmed
Communication (Media, flyers, social networks...)	480-796-321	kao@savethechildrenphx.com	Confirmed
Logistic	480-852-369	oor@savethechildrenphx.com	Confirmed
Sellers (Food and beverage service)	480-147-753	aor@savethechildrenphx.com	Confirmed
The cleaning team and setting up the team	480-698-002	tk@savethechildrenphx.com	Confirmed
Animation team	480-963-735	wop@savethechildrenphx.com	Confirmed
Master of the ceremony	480-173-546	ori@savethechildrenphx.com	Confirmed

3.8 Communication Plan

The communication plan served as a consultant for communications in the course of the fundraising and was up to date as communication necessities alternate. The lead project supervisor took the lead function in guaranteeing robust communication for this event. The communicate requisites were documented in the Communications table and functioned as the advisor for what information to communicate, who did the communicating, when to keep in touch, and to whom to be in contact.

Table 3. List of Medias

Ways of Marketing	Roles	Contact	Email	Audience
TV Advertisements	Advertising and spreading information about the event through the TV	480-654	tvarizona@gmail.com	60% of the population in Arizona and 20% of outsiders
Direct Marketing	Using postcards, letters etc. to access donors	480-568	celebrity@gmail.com	The minimum of 20% of the wealthy donors in the state and 40% of the rich ones.
News Paper	Publishing the event through writing news.	480-357	newspaper@gmail.com	More than 50% of the newspaper reader
Word of mouth	Spread the word as much as possible to let people know about the event.	N/A	N/A	Reaching the maximum of people through sponsors, and volunteers.
Social Media	Marketing the event on the social network	480-770	Facebook Twitter Instagram Etc.	
Public relations	The person who can get coverage across both traditional and new channels.	480-003	xxx@gmail.com	70% or more of the person's followers.

Table 4. Communication Plan

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner
Kickoff Meeting	Introduce the project team and project. Review project objectives and management approach, assignment of tasks.	Face-to-Face	Once	Team Project	Lead PM
Report Meeting	Intro to the sponsors and project.	Face-to-Face	Once	Project Sponsor, Project Team	Lead PM
Project team Meetings	Review status of the project team	Face-to-Face	Bi-weekly	Project team	Lead PM
Project Status Reports	Report the status of the project – including activities; progress; costs; issues	Email	Bi-weekly	Project Team Project sponsor Stakeholders	Lead PM
Milestone Reports	Report the status of reaching milestones	Email and Face-to-Face	As Met	Project Team Project Sponsor Stakeholders	Lead PM

Guidelines of Communication:

- Organization formats and templates use for all email, reports, meeting minutes etc. which are created and used during the assignment

- The organization creates a communication line for new donors
- Volunteers have a platform to communicate effectively with the volunteer coordinator
- Organization meeting guidelines are used.

3.10 Quality Management Plan

All members of the project team were responsible for overall quality management. Quality was monitored from individual work packages to final project deliverables. While each member ensured quality day-to-day, the project manager reviewed processes for improvement monthly. The quality of the project was defined by our deliverables. The project focused on fundraising, creating a fun and safe environment, and raising awareness of our cause. This ensured that our project met quality standards.

3.11 Risk Management Plan

Holding an event with public attendance incorporates many possible legal risks, which can be mitigated by using previous event experiences and plans. We had a folder documenting previous fundraising events and how they handled issues with the public in attendance. We also planned proper and normal security and safety measures for an event this size that would be avoided if not mitigated most risks associated with this event.

The project team brainstormed for any other possible risks that they could think of, as well as researched previous experiences and events for risk avoidance and mitigation plans already used in the past. We used a proactive versus reactive approach to our risk management plan. We also consulted our stakeholders, vendors and participants for any risks that they had addressed in their experiences attending or participating in fundraising events like this. In this way, we used both top-down and bottom-up types of risk analysis and the information stored in a risk profile for this event. Since this is an event, we used a rolling wave type of planning model since, as more details become available, more items were added to the processes in our plan. So, the risk profile and risk register were updated with this new information as the project progressed toward its event date. The major risks were reviewed below, along with possible contingency plans. No in-depth analysis was used since communication and clear understanding are the tools that will reduce any risk of project failure or delay (Das & Teng, 1999).

The most common trigger for a risk event will be if a participant scheduled for our event cancels. This was mainly a schedule risk since now all of us had to help in trying to get a replacement before the day of the event. Working as a team, all of us used our resources and research to keep a list of other viable ideas to “fill in” if needed. Ideally, these replacements also had a method of raising money towards our goal so that we did not lose that ability in the change.

Our change management plan outlined how our team would handle any and all changes, including cancellations and replacements. Any changes went to the project manager for processing and consideration.

The Risk Log and Risk Register for this project will be updated if needed.

A risk profile was made for each vendor who participated in our event. This profile had risk-related questions for the vendor to address regarding past problems and solutions. In this way, our project management team added these profiles to our risk management plan. This also included any food safety or other required documentation by government agencies.

Create Risk Id and Tracking Document

To use anytime during the project by anyone to bring a risk to the attention of the Project Team for consideration and analysis. Keep all documents until the end of the project. Then file for future reference.

The Risk Costs

The risk costs were low at the beginning and increased as we got closer to our event date. Frequent meetings and monitoring of our project schedule helped to mitigate this risk, as well as frequent and quality communications to all stakeholders involved.

List of identified risks - (first that affect the whole project, then risks for individual activities)

- Possibility of rain (as in the forecast) before and on the day of the event
- The possibility that the location cancels (Lucky Bowling Lanes) on or before the day of the event (due to any number of possibilities affecting the location and its employees - fire? Outages?)
- A mechanical issue with bowling lanes on the day of the event
- Possibility of any occurrences outside of our control (like some level of a natural disaster)
- We lose a team member
- Safety- someone gets hurt, attendee (contest) or working on the event
- Security- theft or damage to the area
- After the event, we don't get all the money planned from the participants, i.e. 20% vs 40% promised (honesty)
- Problem with bowling alley equipment during the event.

Table 5. Risk Probability matrix

Risk	Probability	Impact	When Occur	Mitigation
Rain	Low	High	Day of event	Tents. Focus on bowling, indoor activities
Location Cancels	Low	High	Day of event	If time, have another place located; or cancel event
Mechanical breakdown	Low	High	Day of event	Complete check week before; tech. On site.
Lose a team member	Low	High	At any time	Keep a list of possible future team members if needed
Injury	Low	Medium	Day of event	Maintain First Aid and other safety equipment

Assumptions

All vendors, stakeholders and attendees were reasonable and used caution at all times. All structures and facilities are safe and stable. The weather in Phoenix is usually sunny, so we expected sunny. With training, our volunteers and project team were ready to make this a safe and non-event Event. Electricity and plumbing had no problems, but we had phone numbers just in case.

Other Safety/Risk Avoidance Planning

Two off-duty police officers volunteered to serve as security personnel at our event. They trained and worked with several other volunteers to provide security and safety during the event. These officers also made sure the First Aid station, defibrillator and eye wash stations were operational (if needed); fire extinguishers; exits clearly marked; live shooter training and training for all volunteers on what to do in case of an emergency. A list of possible emergencies includes fire, needing an ambulance or paramedic, live shooter, lightning, earthquake, car accident (in the parking lot, for example) and injured pedestrian.

The venue worked with our project team to make this a safe and ‘risk-free event. Insurance coverage was reviewed and verified with the venue for inside and outside issues. Space was made for clear and safe movement throughout the venue, and clear signs guided guests around the venue. Obstacles were evaluated and clearly marked or removed. Considerations for inclement weather (rare rain, for example) were considered and planned for as we got closer to the event date.

Floors were evaluated for slipping accidents, and dry rags were available in case of spills. Signs were posted requiring proper footwear on bowling floors and even everywhere inside the venue (i.e. no bare feet). Personnel were available to monitor and coach, if needed, in using bowling balls correctly and even in proper form when releasing the ball to prevent any back strains and falls! All vendors and volunteers sign a waiver release for any and all liability.

Contingency Plans

1. Venue cancels too close to the date of the event to change venue: plan email and text communication plan to alert all involved of the change. Have a list of all local media contacts and outlets to broadcast a message of change in our event. Post signs outside the venue alerting attendees of change.
2. Try to have two vendors on “back up” in case a vendor cancels, especially on the day of the event! At least have a person to fill in with some entertainment or game to fill the vacancy.
3. If rain or other natural disaster occurs, see the special plan for instructions.
4. If more people than expected show, have stanchions to rope off for lines to enter and provide volunteers to inform the lines with information.
5. Have a future date selected about two weeks later in case the event cannot take place on a planned date for any reason.
6. Keep planning.

There were no buffers built into our plan since everything was scheduled to happen on the day of the event. Cost risks have been minimal since all items are donated and all time and labor have been volunteered. So, there were no reserves for added costs since this is a non-profit and one-day fundraising event. Phoenix Children’s Hospital received the money raised at this event, but there was no legal connection to the hospital, so there is no liable responsibility.

In summary, each risk that had been identified was discussed, analyzed for impact and priority, documented and resolved. The risk profiles were monitored and used to mitigate and avoid as much risk as possible, especially during the event. Since this was a one-day event, every

member was responsible for helping resolve and mitigate any risks as they arise during the process as the event schedule gets finalized during the next few months.

3.12 Project Close and Evaluation

The night of the event, we were going to make sure that everything was on set. The next morning, the project teams met and evaluated the event. We collected from the vendors, and then the following week, we gave the check to the Phoenix Children's hospital for the homeless children. The team members evaluated the volunteers and sent them Thank You notes.

4. Conclusion

This paper has attempted to highlight a qualitative assessment of the organization and project management in a fundraising event in Save the Children Phoenix, Arizona, by carrying it out systematically and sequentially. It has discussed the need for academia to recognize fieldwork's procedural and practical dimensions and how this contributes to knowledge production. The conclusion is that to make the project management team responsible for success would appear inappropriate, and that event coordinators, sponsors, or donors should take an increased interest in the development and use of the event.

There also needs to be an improved distinction between success and failure for the project and project management interests. Project success could be assessed using three assessment criteria based not only on project management techniques but on other external criteria which are important for the successful implementation of projects, from conception through development and use to the final closedown.

Thus, for a project to be successful, there must first identify the project by finding a case and opportunity, forming a project team and turning the discussion into a Work Breakdown Structure (WBS). The WBS is to help the event more accurately and specifically define and organize the scope of the total project. Second, the project management team to identify the constraints that may arise. They can be forms of staff knowledge, legal, liability, cost, or environmental factors. They can be minimized by consulting with event coordinators who have successfully run an event similar to the project.

Finally, one must always bear in mind that successful project management techniques will identify all the requirements needed to run the project smoothly. The risk management plan seems to be the most challenging part of all. Even the most carefully planned project can run into a legal risk. Previous event experiences and plans can be used as a mitigation measure. Other plans are related to budget and cost, staffing, communication, and quality, which all need to be monitored regularly from pre-day events to after-day events.

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