[INSERT LOGO HERE]

Event Optimization Plan

SAMPLE

Instructions: Customize the tables below to clarify the purpose and measurable goals for each event. After the event is completed, conduct an assessment to determine the following:

1. Did the team achieve the measurable goals established?
   a. If yes, what factors most contributed to the success?
   b. If no, what factors impeded success?
2. Should the organization eliminate this revenue stream? Yes___ No___
   a. If yes, define other potential ways to offset the loss of projected revenue.
   b. If no, what changes must be implemented to achieve the measurable goals?

EVENT DETAILS

Fundraising Time Frame [Insert beginning date] until [insert end date]

Description

Event Type: [Insert: Annual signature event, End of Year Appeal, Annual Campaign, etc.)

First Time or Repeat: [Insert: First-time, Fifth annual, bi-annual, etc.]

Purpose of Fundraising Activity/Event

[All goals/objectives should meet the SMART Criteria]

Primary Goals/Objectives	SMART Goal/Objective
Raise Money	Sample: Raise $10k (NET) by 12/30/23
Leverage In-kind Resources	
Friend Raise (Donor Development)	
Increase Awareness	
Generate Volunteerism	
Engage the Community	

REALITIES of the EVENT/ACTIVITY:

DEFINE:

HIGH INPUT ____ or LOW INPUT___ HIGH IMPACT ___ or LOW IMPACT____

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Projected Expenses:		$ Value:

Human Resources:

Total # of Volunteers:	Total # of Volunteer Hours:	$ Value:
Total # of Staff:	Total # of Paid Staff Hours:	

Projected Expenses:	[Describe]	$ Total:

Expected Income: GROSS Profit: NET Profit:

Return on Investment (ROI)=

Donor Acquisition Cost (DAC)=

Strategies to DECREASE Expenses	Coordinator (s)

1. _____
2. _____
3. _____
4. _____
5. _____

Strategies to INCREASE Income/Impact	Coordinator (s)

1. _____
2. _____
3. _____
4. _____
5. _____

Final Recommendations:

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