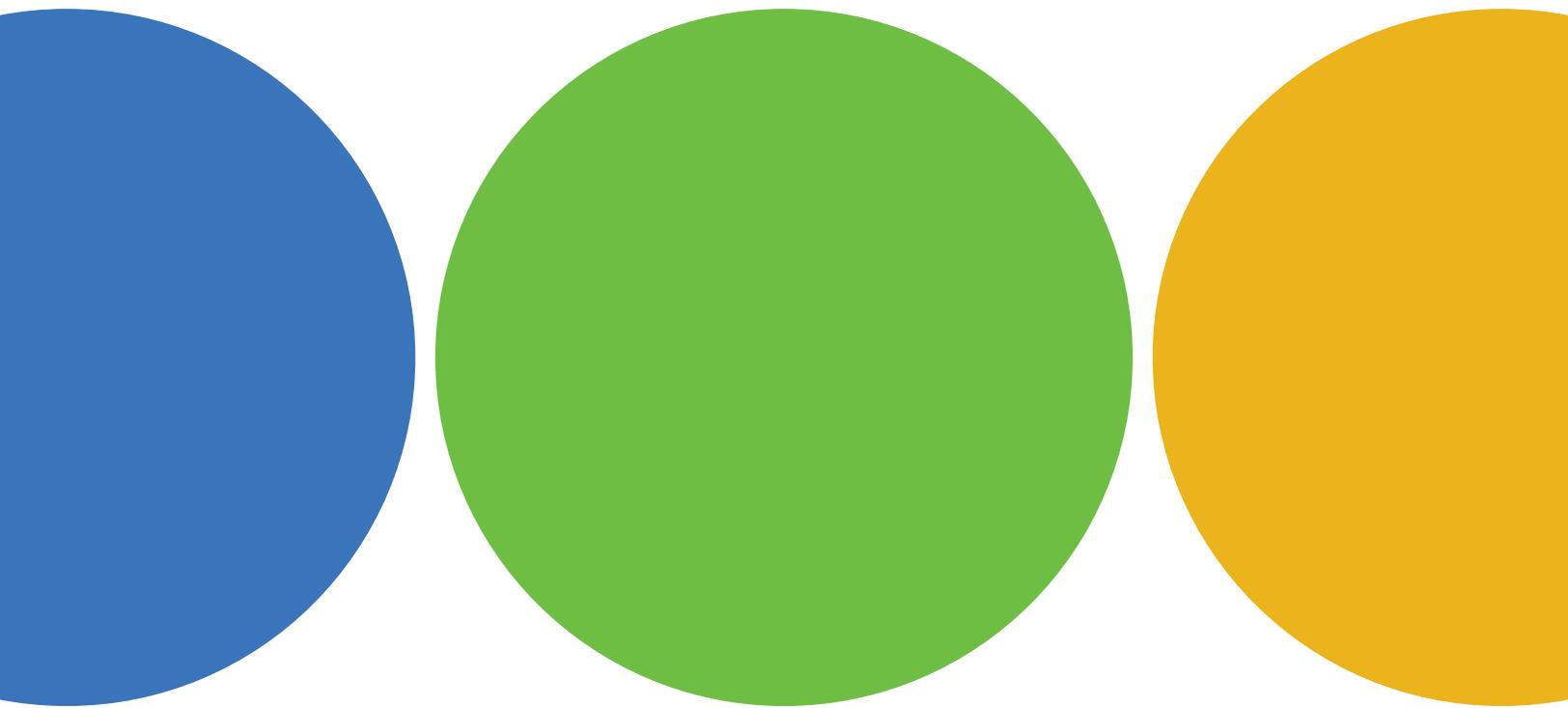


# THE ULTIMATE FUNDRAISING EVENT CHECKLIST



Before, **during**, and **after** your event

# The Ultimate Fundraising Event Checklist

## Use This Before, During, and After Your Event

At BiddingForGood, we've worked side by side with thousands of organizations as they prepare for their fundraising events and we know it's a gigantic undertaking.

For many events, planning starts months, even a year, or more in advance. Much of the success of the event depends on your ability to manage hundreds of details and that's where the checklist comes in.

Checklists are used in medicine and aviation to ensure quality performance, and they can do the same for any event planner, whether first-time volunteer or experienced professional.



### How to use this checklist:

#### Apply your own timeline to the phases.

Even if you have less than a year before your event, you can still make sure you haven't forgotten anything.

#### Adapt the steps to work for your event.

Not every event will need all of the steps included here.

#### Share copies with all of the members of your committee.

Help keep everyone on track.

## Before - Phase 1

9 Months – 1 Year Before the Event

### #1 Business

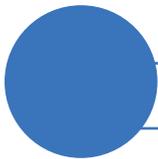
- Review results of last year's fundraiser. Note satisfaction or room for improvement on important event aspects, including venue, donors, volunteers, sponsors, budget, reaching the financial goal, program, and speakers.
- Develop your event goals, both financial and otherwise. When setting financial goals, be specific. In addition to gross revenue, determine what each aspect of the fundraiser will contribute. Include auction revenue, cash donations, ticket sales, etc.
- Create your event budget. Be detailed. List every item that has an expense attached to it and assign a "not to exceed" dollar amount.

### #2 Volunteers

- Build the core volunteer team. Look for a few people who can commit to helping from start to finish. They will help you develop goals, decide on a venue, and determine an event theme.

### #3 Logistics

- Select an event date. Avoid conflict with other large events of any kind if possible (religious holidays, sporting events, other functions in your area).
- Determine if you will need any of the following:
  - Accommodations for anyone working at or attending the event
  - Janitorial staff
  - Permits of any kind (to hold a raffle, for instance)
  - Security personnel
  - Rental equipment (tables, chairs, sound system, projector, etc.)
- Select an event venue. The earlier you do this, the more choice you will have of venues in your budget range available for your best dates.
- Interview and hire any professional help you need such as guest speaker, musicians, decorator, caterer, or auctioneer.



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## Before - Phase 2

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### 5 – 8 Months Before the Event

#### #1 Logistics

- Finalize event theme.

#### #2 Auction

- Assemble an auction item and sponsorship procurement team and schedule your first team meeting. Allow a minimum of three months to get items and sponsors. The more time you allocate, the more items and sponsors you'll get.
- Create a target list of items, donors, and sponsors. Include everyone who donated last year.
- Decide on sponsorship levels and benefits of each level.
- Mail/email donation request letters.
- Begin tracking item and sponsorship information.
- Keep a running list of item and sponsorship responses received, or denied.
- Track items received.

#### #3 Promotion

- Publish the event date on your website and on social media sites.
- Start creating your event promotion materials. If you don't have a staff designer, find a volunteer designer or consider hiring a freelancer.
- Mail a Save the Date for your entire list of potential attendees.

## #4 Business

- Track all revenue earned and budget dollars spent.



## Before - Phase 3

### 2 – 4 Months Before the Event

#### #1 Auction

- Assess catalog value of items donated and sponsorships sold and take corrective action immediately if needed.
- Create unique items and experiences. Write descriptions and determine prices.
- Create item packages. Write descriptions and determine prices.
- Begin uploading items to your online auction site, if applicable.

#### #2 Promotion

- 4 months before the event: find the media deadlines and prepare press releases or “blurbs” for local listings.

#### #3 Logistics

- Clean up and prepare final invitation mailing list.
- Start offering tickets online on your event or auction website homepage. If you sell tickets online, it saves you lots of time and effort in the days just before your event.
- Design and order any event giveaways.

#### #4 Volunteers

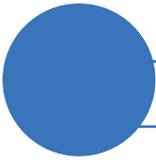
- Create volunteer job descriptions for specific volunteer tasks.
- Begin recruiting volunteers for specific day-before and day-of tasks, including: set up, registration, coat check, table chiefs, checkout, paddle up “runners”, etc.

#### #5 Venue

- Meet with the venue to review floor plan, timing, AV equipment, etc.
- Conduct a WiFi connectivity assessment for mobile bidding on smartphones, if offered.

#### #6 Vendors

- Meet with the caterer and finalize menu, timing, flow of serving, etc.
- Meet with the decorator on final décor and event set up, if applicable.



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## Before - Phase 4

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1 – 2 Months Before the Event

### #1 Promotion

- Begin design for event signage, table tents, bidding instructions, displays, event program, presentations, speeches, etc.
- Continue promoting your event on social media – feature items or use short impact stories to create excitement for your event.

### #2 Auction

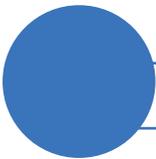
- Designate items for the online, live, or silent auctions.
- Figure out an item fulfillment plan for after the event, including shipping, a pick up time and place, and follow-up invoicing.
- Start previewing auction items on your event website.

### #3 Venue

- Finalize floor plan with the venue.

### #4 Business

- Determine payment processing method for winning bids, cash donations, raffles, on-site ticket sales, etc. Will you use credit card swipers and accept cash or checks?
- Make payment processing arrangement with financial institution or processor.



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## Before - Phase 5

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1 – 2 Weeks Before the Event

### #1 Auction

- If you are auctioning some (or all) items online before your event, open your online auction for bidding about 7-10 days before the event date.
- Proofread all auction items for spelling and grammar, but also be sure they are assigned the correct item numbers.
- If you aren't using auction management software, get the bid sheets and catalog to your printer.
- Meet with the auctioneer to determine auction sequence and timing. Get the auctioneer's professional advice about which items will generate the most revenue, but also interest, fun, bidding, etc.

## #2 Logistics

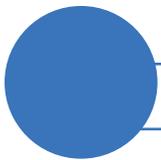
- Create a day-before schedule, including timing for moving everything you can to the venue and set up time.
- Create an event packing list, including any equipment such as computers or printers, that you will need. Begin packing anything you can.
- Create a day-of schedule including the start and end times of every activity.

## #3 Venue

- Make sure the venue can secure any valuable items you want to leave there overnight.
- Work on the final table seating plan.

## #4 Volunteer

- Create final day-before and day-of event volunteer lists and tasks.
- Confirm all volunteers.



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## Before - Phase 6

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### 1 Week Before the Event

## #1 Auction

- Close your online auction no later than a day before the event if you are not offering mobile bidding to attendees. Print bid sheets and catalogs if you are having a silent auction with items in the room. The bid sheets will reflect the highest bid from the online bidders.

## #2 Logistics

- Make attendee/bidder packets (catalog, table number, program, name tag). Make extras for “walk-up” attendees.
- Make sure your core staff/volunteers will be able to answer any questions that might arise from the musicians, the venue staff, the decorator, volunteers, etc. Don’t carry the whole thing yourself.
- Print day-of schedules for all volunteers and staff.
- Complete as much packing as you can.

## #3 Venue

- Make the final seating plan.

## #4 Vendors

- Confirm arrival and set up time with all outside vendors.



## During - The Day of Your Event

Anything you can do the day before, do it! If you have to do all of the set up on the day of, leave yourself plenty of time. And if you get done early, sit down and put your feet up (you deserve it).

### #1 Auction

- Deliver and set up live or silent auction items with bid sheets and signage.

### #2 Logistics

- Print enough copies of the attendee list for everyone helping with registration and a few extras.
- Set up registration and checkout stations with attendee packages.
- Distribute event schedule to all staff and volunteers.

### #3 Venue

- Decorate venue or approve final décor by decorator.
- Sound check AV systems.
- Check WiFi connectivity if you are offering mobile bidding on smartphones.

### #4 Volunteers

- Train volunteers at least one hour before event start time – it's great to do this once everything is set up so the training is as realistic as possible.

### # Business

- Process payments if your processor requires it. Process the next day if you can. You'll be less tired.
- Enjoy your party! You've worked really hard.



## After - Phase 1

1 - 2 Days After Your Event: This is less work than before the event, but arguably just as important. There's no sense in throwing a fantastic, well-organized, financially successful event and then falling short on the follow up!

### #1 Business

- Process payments through your payment processor if you didn't do it the night of the event.



## After - Phase 2

### 1 - 2 Weeks After Your Event

### #1 Business

- Invoice anyone whose bidder number reflects a balance due.
- Create a recap document of the entire event – if you're next year's chair, you'll thank yourself. If someone else is taking over, you'll be their hero!
- Reconcile your budget, expenses, and revenue.

### #2 Logistics

- Ship, deliver, or arrange for pick up of any items according to the plan you made a month or so ago!

### #3 Auction

- Run a follow-up auction to sell any remaining items.
- Thank absolutely everyone - volunteers, item donors, sponsors, and of course, supporters! There is no such thing as showing too much appreciation.

## The YOU Checklist

### 1 - 2 Weeks After Your Event

- Maintain your sense of humor throughout
- Hydrate
- Wear comfortable shoes for set up
- Eat lunch on the day of your event, no matter what!
- Thank your volunteers continuously
- Congratulate yourself!

## Happy Fundraising!

[Click here to schedule a call](#), or contact a salesperson directly at 866-621-0330