

THE ULTIMATE FUNDRAISING EVENT CHECKLIST: 17 ACTIONABLE STEPS



01

FORM YOUR COMMITTEES



To ensure that your fundraising event runs smoothly, you'll need to divide your tasks between committees. Each committee will hold a major role in pulling off your event, and they should work together to coordinate plans.

- **Form the planning committee.** This committee will be in charge of the behind-the-scenes planning before the event. Major tasks will include taking care of event logistics, such as venue and catering, and preparing the planning calendar.
- **Form the host committee.** The host committee will manage fundraising for your event. From recruiting donors to purchasing crowdfunding software, the host committee should help your organization fulfill your fundraising goals.
- **Form the event day committee.** This committee will be in charge of executing the event, ensuring that all staff and volunteers are accounted for and in their proper place.
- **Determine your subcommittees.** Once you have your main committees in place, you'll need to determine which subcommittees you'll need to pull off specific aspects of your event. You'll need to form:
 - Theme and decorations.
 - Catering.
 - Advertising and marketing.
 - Social media management.
 - Entertainment.

Takeaway: Forming your committees upfront can help your organization delegate tasks and cover every aspect of your fundraising event.

02

DETERMINE YOUR GOALS



Before you can rush into planning your fundraising event, you need to know what you're aiming for and which tools can help you get there. To do so, you need to determine your goals. Your goals will direct the course of your event.

- **Review key questions with your committees.** Asking these questions will help your organization assess your needs and create reasonable goals to fulfill those needs:
 - What is the purpose of hosting this event?
 - What do we hope this event will improve in our organization?
 - What specific cause do we want to promote within our larger mission?
- **Determine your fundraising goals.** Your fundraising goal will be the amount of money you want to raise for your organization. You may have an overall goal for your organization as well as individual goals for individual fundraisers. To determine how much you should ask for:
 - Assess your need. How much does your organization need to accomplish a specific task (Ex: we need \$10,000 to build a home for a family in need)?
 - Assess your ability. Look to past fundraising events and campaigns to determine the average amount that you've raised. Though you can and should aim higher, you want your goal to be realistic based upon your donor base.
 - Calculate a challenging, yet reasonable, amount. If your need aligns with your ability, then you can begin calculating your fundraising goal (if not, you may need to reassess the cause you're trying to fund). Set your goal about 30% higher than what you need to give yourself some wiggle room.
- **Determine your stewardship goals.** Raising money is only one of the benefits of hosting an event. You should also be striving to meet with your donors and learn more about them face-to-face. Set actionable goals, such as "We want to cultivate 10 major donors."

Takeaway:
Determining your goals will help your organization stay on target during the event planning process and allow you to assess the success of your event once it's over.

03

SOLIDIFY YOUR BUDGET



Sticking to your budget is necessary to ensure that you actually raise money with your event. One of the worst cases for your nonprofit would be ending up “in the red” and using donors’ gifts inefficiently.

Creating a reasonable budget for your event can ensure that you plan accordingly, cut unnecessary expenses, and further your cause.

Consider your expenses, including:

- Venue costs.
- Crowdfunding software.
- Event software, if necessary.
- Catering.
- Printing costs for marketing materials or invitations.
- Entertainment.
- Promotional items and products.
- Marketing.
- Decorations.

Takeaway:

Mapping out all of your expenses can help you create a reasonable budget, so that you can cut costs and remain profitable with your fundraising.

04

CHOOSE A DATE AND VENUE



Determine your date and venue at least 6 months in advance of your event.

• **Book your venue.** To determine the venue that will work best for your event, consider:

- Size.
- Layout.
- Cost.
- Parking.
- Sound and lighting.
- Permits and licensing.
- WiFi and cell service.

• **Choose your date.** Your date will in part be determined by the venue you choose. Work with the event space to find an opening that works for you. You'll also need to consider dates that will attract the most attendance from your donors. Weekends are generally best because more people can attend; just be sure that your event doesn't overlap with any major holidays or competing events.

Takeaway: Choose a date and venue at least 6 months in advance that will create the most access for your donors, so that as many of them can attend as possible.

05

CREATE A SCHEDULE



To ensure that nothing goes undone, you'll need to create a schedule that delegates all of the necessary tasks by committee, subcommittee, and individual.

- **List out your tasks.** Write out all the tasks that you'll need to complete for your event to succeed. Working backwards from the day of the event to the planning phase can help your team take a comprehensive approach to each task.
- **Create a detailed, accessible timeline.** Now that you know what you need to accomplish, schedule each phase of your plan on a timeline or calendar. Color code the calendar to each committee to keep things organized. Ensure that everyone can access your timeline so that your entire team is on the same page.

Takeaway:
Scheduling your event across all of your committees can help ensure that every task is accounted for and that your team can access your timeline holistically.



Sponsors can help you cut event expenses, raise awareness for your event, and provide in-kind donations. Partnering with sponsors can help you build business relationships in your community and receive a higher profit.

- **Identify potential sponsors.** To determine which sponsors you should request, look for businesses that are:
 - Local, or otherwise tied to your community.
 - Connected to your nonprofit through board members, staff, or volunteers.
 - Supportive of your cause.
 - Able to provide the resources that you need.
- **Determine sponsorship levels.** Identify what your fundraising event needs to be successful and outline sponsorship incentives based upon those needs. For example, you may reward each \$5,000 donation with a visible sign at your event and a logo on your marketing materials.
- **Prepare sponsorship packets.** Centralize all of the information that sponsors need to know in a packet, and send it to the prospects that you identified. [Include a handwritten note](#) or call the businesses in advance, preferably using someone connected to both your nonprofit and the business in question.

Takeaway:
Recruiting sponsors can help you earn more at your fundraising event. Preparing sponsorship materials can help you reach out to local businesses effectively.



Before you can advertise your event, you need to understand the image you're projecting to your donors. Branding your event can create recognition between your organization and your donors and keep all of your communications consistent.

- **Determine your theme.** Your theme will determine the decor, catering, and entertainment that's most suitable for your event.
- **Name your event.** Your event will need a name that donors, sponsors, and supporters will recognize. Be specific, and include your cause in the name.
- **Create an event logo.** Your event logo will be printed on promotional items and marketing materials. You want your donors to think of your organization whenever they see it.
- **Standardize color palettes, fonts, and images.** To ensure that your message and marketing are consistent, standardize these elements across the board, and create toolkits that your marketing team can reference.
- **Write a hashtag.** A hashtag may be your primary means of social media marketing. Your hashtag should be cause-centric and catchy.

Takeaway: Brand your event by planning your event name, logo, colors, hashtag, and theme in advance. Make sure that your marketing team has access to standardized toolkits so that your message stays consistent across your advertisements.



To solicit donations online, you can start a crowdfunding campaign leading up to the event. A crowdfunding campaign allows you to collect donations specifically for the event you're hosting over the course of a designated timeline. To create the most effective crowdfunding campaign, you'll want to incorporate:

- Your fundraising goal.
- A fundraising thermometer that shows your nonprofit's fundraising progress.
- A video or photos showcasing your cause.
- A large "Donate" button.
- Social media sharing buttons.

Start your [crowdfunding campaign now!](#)

Takeaway: A crowdfunding campaign is an effective means of soliciting online donations for your fundraising event. Showing donors what their donations can achieve for your cause can encourage them to donate before the event.



Determine your guest speakers and entertainment well in advance (at least 3 months) so that you can highlight them in your advertisements.

- **Choose a guest speaker.** Choose someone who has a close connection to your organization, such as a recipient of your nonprofit's aid or a board member. The speaker should be prepared to inspire your attendees and make a live appeal for donations.
- **Book entertainment.** Depending on the type of event you're hosting, you'll need entertainment, such as a live band. If you're unsure of what type of entertainment to book, send out surveys to your supporters to narrow it down.
- **Prepare the logistics.** You'll need to solidify:
 - Travel plans.
 - Speech topics or setlist.
 - Bio and photos for programs.

Takeaway:
Entertain and inspire your event attendees by planning for your guest speakers and entertainment stars at least 3 months in advance of the event.

10

SELECT PROMOTIONAL ITEMS



To bring in more revenue at your fundraising event, you can sell promotional items. You can sell items in advance at an online storefront, and you can sell them at the event itself.

- **Choose your items.** When choosing your items, you'll want to select those that make the most sense for your event. Active events, for example, could be paired with water bottles or t-shirts.
- **Brand your items.** Include your event name and logo on your items. Doing so will remind attendees of your event whenever they use the item in the future. Plus, it's free advertising!

Get inspired with [these fundraising ideas!](#)

Takeaway:
Promotional items allow your supporters to donate more and take home a memento once your event is over. Put some thought into which items represent your organization and your event the best.



To advertise your event, you'll need to publicize it throughout your community and in targeted appeals.

- **Create flyers.** Create printed flyers to advertise your event. Place them around the community in prominent locations. You can include QR codes on the flyers, so that donors can access your event page by scanning the code with their phones.
- **Post on social media.** Write social media posts that your supporters can share with their friends and family. Social media posts should include your event hashtag and link to your crowdfunding page.
- **Reach out to local news sources.** Creating a press release for local newspapers can help spread the word. You can also invite the media to cover your event and advertise on local radio and tv stations.
- **Send targeted advertisements.** Send personalized invitations and advertisements to your current donor base, especially those with a past affinity for events.
- **Work with your sponsors.** Work with sponsors to publicize your event. You can include their logos on your publicity materials, and they can advertise your event via their corporate social media channels.

Takeaway: Creating a multi-channel marketing plan can help you reach the most prospects for your fundraising event.

12

PREPARE FOR TICKET SALES



Sell your event tickets through your crowdfunding platform. Encourage supporters to purchase tickets in advance or RSVP so that you can anticipate the size of your crowd and prepare to meet any potential major donors.

- **Determine ticket pricing.** You may want to sell individual tickets, VIP tickets, or family packages (at a discounted rate).
- **Design your tickets.** Create a ticket design that focuses on your cause and the event itself. Remember that supporters who purchase tickets online may want the option to print them off.
- **Invite supporters to your event.** Send personalized invitations to your current donor base and post a large invite on social media. Direct supporters to your event registration page or crowdfunding campaign, so that they can purchase their tickets.

Takeaway:

Determine how you want to sell tickets to your donors and then direct them to your crowdfunding page to purchase their tickets.

13

EQUIP YOUR FUNDRAISING TEAM WITH THE RIGHT SOFTWARE



Using a crowdfunding platform will allow your organization to receive donations from a wide variety of online supporters. You may need additional features and software to pull off your event. Consider:

- **Peer-to-peer software.** You can also equip individual fundraisers with personal fundraising pages for peer-to-peer fundraising. In peer-to-peer fundraising, individual supporters reach out to their networks to solicit donations.
- **Event management software.** Many nonprofit CRMs come equipped with event management software, which allows you to plan your event and send targeted communications to your donor base.
- **Auction software.** Auction software is specialized for charity auctions, and it can be vital to their success. Auction software allows bidders to place bids via their mobile devices and automates the checkout process, avoiding long lines at the end of the event.
- **Text-to-give software.** Text-to-give software allows donors to give to your organization with their mobile devices. This software can be effective at events, as donors rally behind your cause and give all at once after a live appeal.

[Learn more about software](#) that your nonprofit can use!

Takeaway:
Depending on the event that you're hosting, you may need to invest in different types of software to raise the most from your donors.

14

DELEGATE YOUR VOLUNTEERS AND STAFF



As you near the date of your event, ensure that a schedule is in place to take care of the event logistics. Ensure that all of your shifts are covered and that volunteers are scheduled for the three main parts of the event.

- **Set-up.** Volunteers will help set up the event before it occurs. Volunteers should begin work at least two hours in advance of the start time.
- **During the event.** If you've purchased event software, you may have trained staff on hand to manage the technical aspects of your event. Volunteers should be trained to answer questions, direct attendees, and support your event efforts. Provide them with uniforms or t-shirts so that they stand out from the crowd.
- **Clean-up.** Once the event is over, you'll need volunteers to help deconstruct the event space and clean up. Make sure that you have enough volunteers to cover this shift; you don't want to be moving tables and equipment while understaffed.

Takeaway:
Delegating volunteer and staff tasks for the event day can help ensure that everything runs smoothly from beginning to end.

15

PREPARE THE VENUE



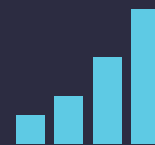
To ensure that your event space is ready to host your event, you'll need to double check that everything is in order.

- **Confirm permits and licensing.** Ensure that you're legally able to host your event by double-checking with your city or with the event space.
- **Approve seating chart.** If your attendees will be seated at tables, make sure that everyone has a place to sit. Create place cards so that guests can easily find their seat.
- **Confirm media attendance.** If you have reporters covering your event, make sure that you have space to accommodate them.
- **Prepare photographers.** Events offer plenty of photo opportunities for your organization. Bring your photographers a few days in advance, so that they can establish the lighting in your event space and make any necessary adjustments to their equipment.
- **Set up promotional items.** Your promotional items should be ordered and ready to display. Set them up on tables so that attendees can clearly see each item that you're offering.
- **Confirm catering.** Confirm that all of your food will be delivered on time and maintained properly (i.e. refrigerated or heated if necessary).

Takeaway: Prepare your venue by confirming that all of the logistics are in place and that everything is set up properly. Taking the time to ensure that your venue is ready for the event can help everything run smoothly on the actual event day.

16

MEET YOUR CROWDFUNDING GOALS



Before the event, you'll need to assess where you are in your crowdfunding goals. If you've met your goal, then you can focus on exceeding it during the event with a live appeal.

If you're lacking in funds, you may need to amp up your fundraising efforts via email blasts and social media posts, rallying both attendees and remote supporters for a last-minute fundraising charge.

Learn more about [achieving success with a crowdfunding campaign here](#).

Takeaway: Assess your fundraising compared to your goals before the event, so that you can push for a last-minute fundraising effort or prepare to go beyond your goal with your event attendees.

17

CREATE A FOLLOW-UP PLAN



Once the event ends, your work isn't over. You'll need to plan a follow-up in advance so that your supporters know how much your organization appreciates their attendance and donations.

- **Process payments.** To ensure that your organization receives donations and that your donors receive their receipts, process payments quickly.
- **Evaluate budget.** Compare your budget to your actual spending. How much was your net profit?
- **Update supporters.** Within 24 hours after the event, post an update to social media that shows how much your donors raised for your cause. Include a photo from the event itself. You can continue to update social media with photo galleries, so that supporters can tag themselves and their friends.
- **Send thank you notes.** Send thank you notes to all of your attendees and volunteers. You may need to create personalized thank you's for major donors to steward them properly. All thank you notes should be sent within a week after the event.
- **Email event surveys.** Once the event is over, learn how you can improve your next event by sending out surveys. Ask your attendees:
 - What they enjoyed the most.
 - What they enjoyed the least.
 - What could be improved for next year.
 - For any additional comments.

Takeaway:
Preparing your follow-up plan in advance will help you thank donors properly and set the foundation for long-term relationships, as well as future events.
