

## Example of Basic Fundraising Event Planning Timeline Scalable to any event (the bigger and more expensive, the more lengthy the timeline)

### 6-11 months out

- Final decision on Chairs/Co-chairs
- Develop Event Committees (Fund Development / Marketing / Auction / Volunteer)
- Discuss & determine event theme
- Review Logo Kit/letterhead needs
- 1st meeting w/co-chairs

### 3-6 months out

- Begin developing Honorary Committee (optional)
- Select event date & book event venue
- Evaluate Vendor needs & Requests for Proposals for Catering, Rentals, A/V (Audio/Visual), Printing
- 1st full committee meeting
- Review list of corporate & underwriting targets with your committees
- Determine underwriter levels & benefits
- Develop, print and compile Silent Auction solicitation packets
- Develop, print and compile corporate sponsorship/program ad solicitation packets
- **Media:** Send Calendar Listing to society 'glossies' (at least 4 months out)

### 3 months out

- Distribute Corporate Marketing and Program Book Packet to potential Sponsors/Advertisers/Auction donors (**Major gifts may require up to 12 months planning**)
- Mail underwriter letters to identified targets (**Underwriting/sponsorships should be secured by the time invitation is being designed @ 6-10 weeks**)
- Develop detailed budget for event and review with event stakeholders (**Get 100% buy-in!**)
- Create payment portal for tickets (strategy for accepting online payments/checks/credit cards, etc.)
- Review Save The Date Ideas with your Chairs and committees
- Draft Contracts/Finalize Requests for Proposals for services
- Start collecting email addresses from event stakeholders for Save the Date

### 2-3 months out

- Follow up on all Corporate sponsorship / Silent Auction / Program ad solicitations
- Update Web Page Event Information (Include contact info, all event details, ticket links, & options for mail-in)
- **Media:** Define Media/Publicity Strategy (coordination of advertising, PR, and social media)
- Event site visit – preferably for Committee meeting
- Encourage Committee members to purchase tickets early
- Send out RFP's for A/V needs
- Create Save the Date & email
- Start collecting snail mail invitation lists from all event stakeholders (consider how this list is organized & how mailed; i.e. w/ personal note from chair?)

### 6-10 weeks out

- Start recruiting volunteers for the night of duties
- Continue and start last push for Silent Auction and Ad Solicitations
- **Send Invite to printer** (Be mindful of printer deadlines: Allow 1-2 weeks from time artwork is sent to printer until your desired drop-date, i.e. when it hits mailboxes)
- **Media:** Distribute Calendar Release 8 weeks out (monthlies due beginning of prior month)

- **Media:** Distribute full Press Release to all media targets 6 weeks out

#### **4-6 weeks out**

- **Finalize event web page info** (Triple check for sponsor & underwriter logos/names)
- **Mail formal Invitations** (if not through printer/mail-house combination)
- Review ticket sales with committees – evaluate goal performance
- Adjust budget for unexpected expenses/income
- Have Silent Auction committee develop a Silent Auction check out procedure
- If ticket sales are slow, make personal calls
- Identify banner/signage needs, design, & send to printer
- **Media:** Follow up with media targets to try to secure event coverage
- **Media:** Coordinate email and social media invitations (continue following up with media targets-weekly & dailies)

#### **2-3 weeks out**

- Finalize Budget
- Finalize Silent Auction and Program (with ads) and design forms/programs
- Create first draft of Run of Show (Event schedule & script) and review with Chairs
- Create list of all vendors to be paid day/week of event
- Review Volunteer Duties
- Program Book, Silent Auction Listings to Printer
- Review Check-in Process with volunteers & committees
- Push Selling tickets to outstanding committed attendees (Consider incentives/promos/ticket giveaways)
- **Media:** Encourage all event stakeholders to distribute personal email invitations (consider all friends, family, patrons, existing & potential collectors, VIP targets)

#### **Week of Event**

- Create vendor day-of point person list (with emails & cell phone numbers)
- Create a detailed Load In / Sound Check schedule (may be included in Run of Show)
- Create sorted guest lists (seating charts/table assignments): sort by last name AND company affiliation
- All printing (programs/silent auction forms/labels) & signage picked up
- Media: Send digital reminder to all contacts and those of event stakeholders

#### **Immediate Follow Up**

- Close-Out (All income/expenses collected and logged)
- Confirm all Receivables Paid

#### **2-6 Weeks after (Closeout, Evaluation & Stewardship)**

- Committee Acknowledgements (Gift to Chairs?)
- Acknowledgements sent to Attendees
- Special "thank you's" to corporate sponsors, Underwriters, and Silent Auction donors. (Hit any stand-out advocates / Make it personal)
- Thank You Event for volunteers
- Close out receipt of income and payment of expenses and create closing financial report (Profit & Loss)
- Share event results with all event stakeholders