

Fundraising Event Action Plan

<p>➤ Planning Phase: <i>One year to six months before event</i> <i>During this phase you will be heavily engaged in goal setting and team building activities.</i></p>		
Task (example)	Date due	Status
Identify location and check availability	9/15/06	Done
Task	Date due	Status
Identify purpose: fundraising, cultivation, recognition, education, other		
Select type of event and theme		
Identify audience		
Secure buy-in from your volunteer leaders		
Set initial goals: net profit, expenses		
Identify additional sources of revenue		
Research and determine date		
Identify location and check availability		
Identify and recruit chairs and co-chairs		
Draft chair and committee chairs, job descriptions and recruit volunteers for committees		
Prepare activity timetable		
Other		

Fundraising Event Action Plan (cont.)

➤ **Activity Phase: *Nine months to three months before event***
Continue team building and begin logistics and marketing activities.
Start pursuing sponsors, advertisers and gifts-in-kind.

Task	Date due	Status
Determine volunteer responsibilities and number of volunteers needed		
Begin meetings with chairs and co-chairs		
Chairs and co-chairs recruit additional volunteers		
Invite special guests or celebrities		
Establish cost to event participants		
Secure location		
Develop sponsor goals and packages		
Prepare marketing and PR plans		
Identify printing needs and prepare printing timeline		
Draft invitation and response package		
Compile invitation lists		
Secure sponsors		
Send out "Save-the-date" notices		
Secure catering bids		
Secure musicians and entertainment		
Secure media coverage		
Solicit in-kind donations		

Fundraising Event Action Plan (cont.)

Task	Date due	Status
Tour site		
Review volunteer needs and continue to draft more if needed		
Continue to add names to invitation list		
Secure permits and insurance		
Make preliminary layout and decoration plans		
Print tickets		
Other		

Fundraising Event Action Plan (cont.)

<p>➤ Execution Phase: <i>This is the time to finalize logistics and do heavy marketing. Your success in pursuing sponsors and donors will depend upon good planning.</i></p>		
<p>• Three months to one week before event</p>		
Task	Date due	Status
Send out "save the date" notices and invitations		
Perform menu tastings		
Sign contracts with venue, caterer, entertainment, etc.		
Reconfirm all speakers, performers, celebrities and find out their special needs		
Draft program		
Draft site layout		
Finalize menu and floor plan		
Monitor underwriting, sponsorships and program ads		
Record invitation responses and issue tickets		
Collect in-kind donations		
Send out press releases and calendar notices		
Prepare and print programs		
<p>• Event Week</p>		
Task	Date due	Status
Assign and provide job descriptions to volunteers for the day of the event		

Fundraising Event Action Plan (cont.)

Task	Date due	Status
Arrange deliveries for the day of the event		
Give caterer head count		
Prepare necessary signage		
Prepare nametags and labels		
Meet with security people		
Deliver scripts/recognition lists to chairperson/master of ceremonies		
Have necessary checks cut		
Determine and prepare petty-cash needs for tips, etc.		
Make follow-up calls to media contacts		
<ul style="list-style-type: none"> • Event Day 		
Task	Date due	Status
Arrive very early and come prepared with emergency phone numbers, first aid kit, office supplies, insurance paperwork and contract confirmations, guest lists and extra copies of scripts and volunteer instructions		
Do site walkthrough		
Perform equipment check		
Place signage		
Check restrooms and grounds		
Layout registration tables and materials		

Fundraising Event Action Plan (cont.)

Task	Date due	Status
Brief volunteers		
Station yourself where you can be seen if needed		
Pay vendors		
Mix and mingle and have fun!		

Fundraising Event Action Plan (Cont.)

<p>➤ Recap Phase: <i>After the event</i> <i>Communicate with everyone involved in the event. Begin building next year's team.</i></p>		
Task	Date due	Status
Thank volunteers, sponsors and donors appropriately		
Tally expenses and income		
Prepare final report and share with volunteers and key players		
Review all aspects of event with volunteers for use next year		
Publicize success		
Return borrowed or rented equipment		
Other		