

12 Months Prior

- Set fundraising goal and objectives, desired audiences
- Determine the event budget
- Name the event
- Set date/time
- Prepare sponsor packages and identify sponsors
- Secure location
- Complete initial facility walk-through
- Identify potential volunteers and establish committees or teams that need staffing
- Schedule any committee meetings through the rest of the planning cycle

9-11 Months Prior

- Begin acquiring key invitation lists
- Secure caterer
- Develop theme
- Begin identifying and contacting speakers/entertainers for interviews
- Determine how the organization – its mission, vision and impact – will be presented to those in attendance
- Complete sponsor pre-sales
- Meet with each sponsor to determine how to “activate” their sponsorship
- Obtain any needed permits/licenses/insurance
- Determine any side activities: auction, journal, pre-event, etc

6-9 Months Prior

- Narrow invitation lists
- Complete final plan for staff/volunteer involvement and assignment list
- Complete sponsorships deals
- Finalize menu
- Finalize speakers/entertainment contracts
- Secure an event emcee
- Complete insurance contracts
- Continue volunteer recruitment
- Secure audio-visual company and photographers
- Create video about the organization’s impact (if you will be using one)

3-6 Months Prior

- Launch an event website
- Begin preparing press releases, media advisories and press kits

- Create social media plan
- Develop attendee gifts/promo items/event printing needs/banners/buttons etc.
- Begin preparing invitations; make sure they include the required disclaimers
- On-site meeting with caterer and a/v company to go over specific needs
- Arrange for security
- Hire photographer and videographer

2-3 Months Prior

- Finish addressing invitations and prepare for mailing
- Add invitation to website and/or social media if appropriate
- Send save the date information
- Arrange for valet/attendant parking
- Complete plans for promotions
- Complete program/agenda; assign responsibilities for different portions of the event; run through timing
- Begin ticket and table sales

4-6 Weeks Prior

- Mail invitations
- Designate RSVP personnel
- Complete press kits/press invitations
- Complete press room arrangements
- Begin press coverage/media spotlights
- Complete all required printing
- Complete volunteer recruitment for those needed day-of (non-board members)
- For board members, who should be assigned to tables and major donors – coach regarding whom to meet, what to say, goals for relationship-building
- Finalize theme (decor/floral/signage)
- Finalize registration/welcome
- Call table sponsors for the names and contact information of all their guests if that was not provided previously

2-3 Weeks Prior

- Mail press releases and advisories
- Go over physical layout and follow-up with staff, a/v company and caterer
- Remind staff/employees/board about event
- Finalize seating
- Complete checklist review

1 Week Prior

- Complete event walk through with all appropriate personnel, including location staff
- Check all materials
- Complete tour training if appropriate
- Send employee reminder
- Follow-up on press release with calls to media
- Follow-up on photo opportunities with calls to media
- Set TV/radio appearances
- Complete RSVP and give attendance numbers to caterer
- Alphabetize a registration list for ease of check-in
- Finalize seating arrangements and prepare seating cards
- Review checklist
- Will entertainers/vendors need to be paid – if yes, prepare checks
- Will cash be changing hands – if yes, bring cash and set up control systems
- Assign a “go-fer”
- Prepare all necessary phone numbers, contingency plan, agendas
- Arrange for a clean up crew if needed
- Be sure lines of authority are clear

Day of Event

- Execute all logistics
- Gather contact info from all attendees if not previously obtained during registration

1 Week Following Event

- Reconcile the budget
- Write thank you notes
- Send reports to sponsors – meet individually with each one to determine satisfaction
- Hold thank you party for key contributors and committee members
- Complete satisfaction surveys
- Meet for review and ideas for next year
- Add attendees’ names to your mailing list
- Write to them, thank them for coming; tell them how much money was raised and/or what else was accomplished
- Thank all chairs, sponsors, vendors, volunteers, staff, hotel staff as appropriate, reporters, etc.
- Send a commemorative program to those who bought ads and anyone unable to attend for whom it would be important to have one
- Ask committee members to do a post-event evaluation (you prepare the form)
- Keep all records and materials for next year’s chair
- Do post-event publicity
- Create cultivation plans as appropriate for guests/new donors and committee members