Fundraising Event Action Plan

|  |
| --- |
| * **Planning Phase**: ***One year to six months before event*** *During this phase you will be heavily engaged in goal setting and team building activities.*
 |
| ***Task (example)*** | ***Date due*** | ***Status*** |
| *Identify location and check availability* | *9/15/19* | *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 |  |  |

|  |
| --- |
| * **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 |  |  |

|  |  |  |
| --- | --- | --- |
| **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 |  |  |

|  |
| --- |
| * **Execution Phase**:

*This is the time to finalize logistics and do heavy marketing. Your success in pursuing sponsors and donors will depend upon good planning.* |
| * ***Three months to one week before event***
 |
| **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 |  |  |
| * ***Event Week***
 |
| **Task** | **Date due** | **Status** |
| Assign and provide job descriptions to volunteers for the day of the event |  |  |

|  |  |  |
| --- | --- | --- |
| **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 |  |  |
| * ***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 |  |  |

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

|  |
| --- |
| * **Recap Phase: *After the event***

*Communicate with everyone involved in the event. Begin building next year’s team.* |
| **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 |  |  |