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# Event Planning Check List

...Success Toolbox™

Event: \_\_\_\_\_

Event Date: \_\_\_\_\_

Event Chairperson: \_\_\_\_\_

## *Fundraising Event Planning Check List (with auction)*

ACTION ITEM	ASSIGNED TO	TARGET	<input checked="" type="checkbox"/>
Preliminary brainstorm to determine general event information, including type of event, general goals, target group, etc.	Selected Organization Members	36 weeks	
Select committee chair people	Chairperson	34 weeks	
Host the initial committee meeting. During this meeting, assign specific tasks and discuss time frames and expectations. You may wish to hand out the Committee Job Descriptions.	Chairperson	31 weeks	
Define the scope of the event, including the goals for your event.	All committees	31 weeks	
Form Auction Committee (if applicable.)	Chairperson	31 weeks	
Research other events in the community calendar (and your organization's) and select potential dates for your event. Research possible facilities to hold your event. Once your date and location have been selected, note your local Chamber of Commerce and other organizations that maintain community or social calendars.	All committees	31 weeks	
Develop artwork/graphics for the event. Begin developing the design/layout of promotional materials (posters,	Promotion Committee	22 weeks	

ACTION ITEM	ASSIGNED TO	TARGET	<input checked="" type="checkbox"/>
invitations, etc.)			
Host the initial Auction Committee meeting. During this meeting, develop an outline for your auction, determine fundraising goals, discuss time frames and expectations, You may wish to hand out job descriptions.	Auction Chairperson	22 weeks	
Negotiate price with facility, including criteria for how many people can attend.	Event Production Committee	22 weeks	
Research potential caterers and entertainment options. Negotiate prices.	Event Production Committee or Catering & Entertainment Committees	22 weeks	
Host a brainstorming session to develop the “wish list” of auction items. Determine the number of items needed. Assign individuals to solicit items and begin the solicitation process.	Auction Chairperson	22 weeks	
Develop the event budget based on budgets submitted by each committee.	Committee Chairperson and Finance Committee	22 weeks	
Develop the promotion and publicity strategy, including auction strategy.	Committee Chairperson and Promotion Committee and Auction Chairperson	22 weeks	
Develop your sponsorship and underwriting plan, including sponsorship criteria and realistic financial goals.	Finance Committee and/or Underwriting Subcommittee	22 weeks	
Develop a list of potential sponsorship opportunities and sponsors.	Finance Committee or Underwriting Subcommittee	22 weeks	
Once all the details for the event have been determined, the ticket price can be established. Remember to include your sponsorship goals in determining the final price.	All committees	22 weeks	
Prepare sponsorship packets and begin contacting potential sponsors.	Finance Committee or Underwriting Subcommittee	20 weeks	
Develop a list of potential volunteers and phone numbers.	Event Production Committee or Volunteer Subcommittee	16 weeks	
Develop media list.	Promotion Committee	16 weeks	
Send calendar releases to monthly publications.	Promotion Committee	16 weeks	
Draft Organization Summary and Event Overview.	Promotion Committee	16 weeks	
Organize and update an invitation list (including purchasing or obtaining lists from other organizations).	Promotion Committee or Ticket Sales Subcommittee	16 weeks	
Determine the auction schedule.	Auction Committee and Event Production Committee	12 weeks	

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Establish the credit card merchant and bank accounts with a local bank (if necessary)	Auction Chair and Event Chairperson	12 weeks	
Prepare the mailing for “save the date” cards. (Labels, stamping, addressing, sorting, etc.)	Promotion Committee or Ticket Sales Subcommittee	11 weeks	
Send a tease announcement or “save the date” notification to your mailing list.	Promotion Committee or Ticket Sales Subcommittee	10 weeks	
Develop a list of volunteer jobs and begin recruiting.	Event Production Committee or Volunteer Subcommittee	10 weeks	
Develop the layout of the facility, including placement of tables, stages, bars, auction area, etc.	Event Production Committee PLUS any subcommittees	10 weeks	
Finalize design of tickets, posters, flyers, postcards and any other promotional materials. Take materials to local printer.	Promotion Committee	10 weeks	
Recruit the auctioneer (if appropriate).	Auction Committee	10 weeks	
Negotiate paid advertisement campaign with media, if necessary.	Promotion Committee	9 weeks	
Begin preparing the mailing of your invitations (addressing, stamping, sorting, etc.).	Promotion Committee or Ticket Sales Subcommittee	8 weeks	
Prepare all press releases and other media information, confirming specifics to insure correct published information.	Promotion Committee	8 weeks	
Send General Press Release to the local Chamber of Commerce, hotels, and other organizations.	Promotion Committee	8 weeks	
Send PSA’S to radio and TV media.	Promotion Committee OR Press Subcommittee	8 weeks	
Arrange to borrow or rent required supplies, equipment and materials, including tables, chairs, PA system, cooking supplies, dishes, etc.	Event Production Committee or Decorating Subcommittee	8 weeks	
Make arrangements for photographing the event.	Promotion Committee	8 weeks	
Order required event specialty items, such as custom glasses, aprons, T-shirts, etc.	Promotion Committee	8 weeks	
Contact local radio and cable stations regarding participation in local talk shows.	Promotion Committee	8 weeks	
Designate your telephone ticket sales subcommittee (if appropriate) and assign individual names for each member to contact	Promotion Committee or Ticket Sales Subcommittee	7 weeks	
Make final plans for required decorations and order supplies.	Event Production Committee	6 weeks	

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Schedule a visit to the site with the management of the facility.	Event Production Committee	6 weeks	
Send invitations.	Promotion Committee or Ticket Sales Subcommittee	6 weeks	
Complete auction item solicitation.	Auction Committee	6 weeks	
Send Calendar Release to publications that publish weekly.	Promotion Committee	5 weeks	
Prepare Media Kits.	Promotion Committee	5 weeks	
Put “packages” together. Determine minimum bids for each item. Number auction items in order of presentation to bidders.	Auction Committee	5 weeks	
Finalize the list of volunteer jobs needed for your event day and recruit accordingly.	Event Production Committee or Volunteer Subcommittee	4 weeks	
Send Calendar Release to publications that publish daily.	Promotion Committee	4 weeks	
Send General Press Release to weekly publications.	Promotion Committee	4 weeks	
Send Media Advisory and pitch letter to appropriate editors.	Promotion Committee	4 weeks	
Take committee members to the event site for a complete event walk through, develop your list of potential “what if” problems, finalize plans with the facility management and review the details of the event.	All Committees	4 weeks	
Confirm plans with caterers, entertainers and other vendors supporting the event.	Event Production Committee and appropriate subcommittees	4 weeks	
Distribute posters, flyers, and other promotional material.	Promotion Committee	4 weeks	
Prepare the auction catalog.	Auction Committee with Promotion Committee	4 weeks	
Send/deliver Media Kits.	Promotion Committee	3 weeks	
Print programs, have signage made, and finalize any last minute promotion.	Promotion Committee	3 weeks	
Send General Press Release to all publications.	Promotion Committee	3 weeks	
Make follow-up calls to editors to whom pitch letters were sent.	Promotion Committee	3 weeks	
Prepare auction item signage and silent auction bid sheets.	Auction Committee	3 weeks	
Fax General Press Release to publications if they have not yet published any information.	Promotion Committee	2 weeks	

ACTION ITEM	ASSIGNED TO	TARGET	<input checked="" type="checkbox"/>
Finish follow-up calls to pitch letter editors.	Promotion Committee	2 weeks	
Double check ticket sales and provide communication to the entire event committee.	Promotion Committee or Ticket Sales Subcommittee	2 weeks	
Double check and confirm the plans of the Decoration Subcommittee, event set-up team and clean-up team. Make sure every detail has been anticipated and, most importantly, that the plans are realistic.	Event Production Committee and appropriate subcommittees	2 weeks	
Finalize and confirm the photographer for the event.	Promotion Committee	2 weeks	
Finalize relationships with all sponsors and underwriters, including receipt of fluids.	Finance Committee or Underwriting Subcommittee	2 weeks	
Collect all auction items and tag with a donor release form.	Auction Committee	2 weeks	
Prepare auction receipts and auction board.	Auction Committee	2 weeks	
Final deadline for ticket sales. Catering and event ticketing requirements will dictate your ability to sell tickets up to the date of the event.	Promotion Committee or Ticket Sales Subcommittee	1 week	
Confirm all volunteers for the day of the event.	Event Production Committee or Volunteer Subcommittee	1 week	
Prepare bidder paddles.	Auction Committee	1 week	
Meet with the auctioneer (at the site if possible) and review all auction items.	Auction Committee	1 week	
Final review of guest list, including seating assignments if required.	Promotion Committee or Ticket Sales Subcommittee	3 days	
Committee chair people to review emergency exits, location of telephones, communication system, and other emergency plans, etc. with facility staff.	All Committees	3 days	
Confirm all third party relationships (caterer, entertainment, rental company, etc.).	Event Production Committee and appropriate subcommittees	3 days	
Set up event, including table settings, chairs, decorations, auction area, etc.	Event Production Committee and all appropriate committees	day of	
Two hours prior to event, double check all facility set-ups. At this time, the facility should be completely set-up and clean of all boxes and other maintenance and supply materials. Don't forget to check bathrooms, lighting of candles, placement of seat name tags, etc.	Event Production Committee	2 hours prior	
You made it. Enjoy the event.	All committees	during event	

ACTION ITEM	ASSIGNED TO	TARGET	<input checked="" type="checkbox"/>
The time keeper (or event coordinator) must keep careful track of the event schedule.	Event Production Committee	during event	
Clean up facility and remove event related equipment and supplies.	Event Production Committee	following event	
Return all rental and borrowed equipment.	Event Production Committee or Decorations Subcommittee	day after	
Call key committee members and give them personal thanks.	Chairperson	day after	
Prepare the final auction accounting. Complete the final accounting of event revenues and expenses.	Finance Committee	1 week after	
Send Follow-Up Press Release announcing money raised and details of the event.	Promotion Committee	1 week after	
Final committee meeting, including evaluation of the event and notes for next year.	All committees	1 week after	
Send “thank you” notes and special gifts to sponsors, underwriters, etc.	Finance Committee or Underwriting Subcommittee or Thank You Subcommittee	1 week after	
Send “thank you” letters and tax documentation to auction donors and buyers.	Auction Committee	1 week after	

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