

EVENTOLOGY

The 12 Month Timeline

10-12 Months in Advance

- Define the purpose for your event
- Select a date and venue. Consider space needs, parking, WiFi, community calendars, popular dates, holidays and major sporting events.
- Establish a budget including fundraising goals and revenue streams
- Hire a professional benefit auctioneer specialist
- Select an event chairperson who is well connected and has strong leadership skills
- Establish overall committee names and responsibilities
- Research auction software: Which solutions can help streamline your event?
- Develop a general marketing plan
- Explore the organization's donor database to develop the invitation list
- Develop underwriting and sponsorship levels and benefits
- Research and identify past and potential sponsors and underwriters
- Identify a Volunteer Coordinator

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7-10 Months in Advance

- Choose an event theme (the volunteer co-chairs of your event should have a say in all of the details that many deem to be the “fun stuff,” like choosing the theme)
- Recruit and establish committees
- Develop the team captain and team member contact lists
- Begin acquiring underwriters and sponsors
- Develop donation forms
- Create a volunteer waiver form to legally protect liability of the organization from accidents and other incidents
- Detail the marketing plan and calendar
 - Create graphics for theme
 - Hire a graphic designer, if needed
 - Develop save-the-date announcements
 - Develop promotional emails
 - Develop and send solicitation letters and in-kind donation forms
- Continue refining and adding to invitation list
- Conduct a procurement team meeting
- Hire a professional audio-visual company
- Secure benefit auction software if appropriate

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5-7 Months in Advance

- Meet with Committee Team Captains to develop committee plans
- Interview caterers and entertainment if necessary*
- Select a Master of Ceremonies and/or announcer
- Begin auction and event promotion
 - Begin the invitation design
 - Mail the Save-the-Date announcements
 - Develop event specific website, domain and hashtags
 - Create signature tag for staff and volunteers to use in email
 - Ensure event is posted on your organization's website
 - Create evite and Facebook event
 - Write, distribute press release about the event with pictures & PSA
- Continue acquisition of underwriters and sponsors
- Begin to brainstorm the story for the Special Appeal
- Establish a firm deadline for acquisition of auction items
- Track acquisition of auction items and start collecting images

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3 -5 Months in Advance

- Post updates with hashtags on social media and websites
- Create the ability to sell tickets and sponsorships online
- Continue to solicit auction items; check with the State Attorney General's office regarding your specific state laws and whether you need to notify your guests about consignment items or not
- Consult with auctioneer on floor plan and event layout
- Consult with auctioneer on registration, cashiering, and auction claim & removal process
- Consult with audio-visual company about needs for the event
- Continue procuring underwriters and sponsors
- Solidify story and identify donation levels for Special Appeal
- Film video for Special Appeal
- Begin securing preplanned major gift for Special Appeal
- Secure date for volunteer thank you party

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1-3 Months in Advance

- Mail the invitations
- Distribute press release that highlights charity and its success
- Arrange local radio interviews of founders or beneficiaries
- Distribute promotional emails and newsletters
- Promote event on social media once a week
- Invite friends through Facebook event page, encourage committee to do same
- If budget allows - boost post through Facebook
- Review "likes" on boost post and invite those who have not liked, friended or followed organizational FB page to like - build your audience
- Promote event on website home page and event websites
- Finalize sponsorships
- Prepare or order bid paddles or cards and bid sheets
- Create a phone bank team of volunteers to call or email invitees
- Secure and train Table Captains

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1-3 Months in Advance (continued)

- Develop layout of the seating and auction displays
- Begin to develop auction catalog
- Create Live Auction slideshow
- Design sponsor recognitions
- Confirm with entertainment, Master of Ceremonies, sound company, and caterer
- Create live and silent auction display boards
- Finalize checkin and checkout procedures
- Finalize auction item pickup procedures
- Begin to create guest list and seating charts
- Begin to write the Run of Show script for the event

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2 Weeks in Advance

- Schedule a phone conference with your auctioneer to review the catalog and sequence of live auction items
- Create needed certificates for auction items; verify expiration dates and fine print on all procured certificates
- Create list of volunteer assignments and schedule
- Create needed signage
- If using auction software, assign items to packages and sections
- Finalize Run of Show script and schedule a dress rehearsal
- Create floor plan for silent auction
- Communicate with speakers; ensure they are comfortable with their part
- Confirm key volunteers for the day after the event (answering phones, processing donations, etc.)
- Continue to encourage attendance
- Enter last minute guests

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1 Week in Advance

- Review final catalog and script with your auctioneer
- Ensure all silent auction items have package numbers attached
- Assign guests to tables; provide for unexpected guests in table assignments
- Provide final guest count to venue and caterer
- Finalize number of volunteer spotters/ringmen for the live auction (one for every 125 people in the crowd)
- Confirm setup for computers and printers at venue; test Wi-Fi capabilities
- Hold volunteer training
- Print bid sheets if using auction software
- Organize all auction certificates in numerical order by bid number

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1 Day before

- Print catalog addendum if needed
- Print final schedule and script; distribute as needed
- Deliver all items to venue if possible
- Ensure all live and silent auction items are entered into auction software
- Review guest list and ensure all guests are entered into event software
- Hold dress rehearsal, if possible

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Day Of Event

- Sound and lighting check
 - Make sure video presentations work with equipment provided
 - Make sure cordless microphones all have new, fresh batteries
- Match up bid sheets to auction items
- Set-up auction
- Hold dress rehearsal (unless it is an early event, in which case do one day before event)
- Hold a staff and volunteer meeting several hours before the event to ensure all roles and responsibilities are clear and to answer any questions
- During the event, be as relaxed, calm and joyful as you can be, and accept that with any large event there is likely something that will go wrong. You've done your absolute best to plan out every detail, and now it's time to empower your team to do their best when executing, and let go of the rest. The single most important thing to remember is just to focus on creating a wonderful experience for your donors and guests!

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Post Event

- Pre-determined Post-Event Volunteers to handle assigned tasks the day after the event (ie. answering phones to deal with overcharges, lost items, buyer's remorse, credit cards that were declined, etc.)
- Within 36 hours of the event, ensure each auction winner and Special Appeal donor has been appropriately charged for their purchases and donations
- Within 48 hours of the event, ensure all donations and any credit cards of any kind have been processed, checks deposited, and receipts emailed out if they were not given out the night of the event
- Update the donor software database with each new donor and update existing donor profiles with any new information you captured at check-in
- Anticipate and complete these follow-ups:
 - Arrange for pick-up, delivery or shipment of items that were not picked up
 - Issue certificates for consignment item donations
 - Decide what to do with items that didn't sell. Do you donate them to another organization, sell them online or repackage them for another event?

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Post Event (continued)

- Follow-up with guests that may have needed special handling that evening and ensure their experience was a positive one
- Run major reports (will depend on the type of software you're using, but here are some sample ones you may wish to run:
 - Grand total of all donations by type
 - Total purchases/donations by guest
 - Total purchases/donations by table
 - How many guests donated the day of the event (% of attendees)
- Look at post-event data in order to determine with whom you need to follow up, what auction items were the best sellers, which table hosts brought the most donors, etc.
- Complete the projected and actual final budgets, and use this information to inform board members and staff about the success of the event
- With completed financial information, determine your return on investment (ROI) / profit from the event
- Hold a debriefing meeting/session with all major stakeholders

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Post Event (continued)

- Personally thank each person who attended (whether they donated or not) with a phone call or a written thank you.
 - Run a donor report and divide the list into categories of major donors, mid-donors, and entry-level donors
 - Divide up the list (for example, have board members make a personal phone call to all major donors, the Executive Director thanks the mid-level donors, and the development staff thanks everyone else)
 - With each phone call and visit, be sure to communicate how the funds will be used, ask each donor for permission to place them on your email list if they aren't on it already, and ask them what they enjoyed about the event and if they have any constructive feedback for next year
- Follow up with a personally delivered thank you gift for sponsors and in-kind donors who donated high ticket items
- Hold a Donor Appreciation Event
- Hold a Volunteer Appreciation Event

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Post Event (continued)

- Ask for feedback. Send a post-event survey via email to everyone, and then personally ask board members, the Event Chair/Co-Chairs, key donors and volunteers for their opinion and post-event feedback.
- While all of the event details are fresh in your mind, create an Event Summary & Recommendations report for next year's event. Include things that went well, things that didn't go well, and ideas for improvement or things to ensure happen next year and in following years to make future events the best they can be!