THE ESSENTIAL FUNDRAISING EVENT CHECKLIST: PLANNING

Your fundraising event is likely one of, if not the, biggest revenue generators of the year, so you want to get it right. Managing (and remembering!) all the important elements for your fundraising event takes some skill and organization.

Our pre-event checklist simplifies your planning efforts by pulling together all the essentials for hosting a successful event that expands your mission. Just download, print and keep handy during all your event planning needs.

56%
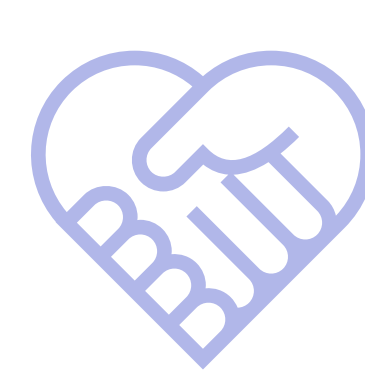of donors regularly attend fundraising events[1]

43%
attend charitable events in their community because of social media[2]

38%
of small nonprofits host 2-5 events and 21% host more than 25 per year[3]

73%
of nonprofits say their biggest event challenge is getting new attendees[3]

## YOUR PRE-EVENT PLANNING CHECKLIST

▶ PRE-EVENT PLANNING

- ☐ Event details: start date and time, end date and time
- ☐ Name of event
- ☐ Event location
- ☐ Event theme
- ☐ Event logos and colors
- ☐ Tickets and/or registration
- ☐ Determine ticket levels and pricing
- ☐ Host(s)
- ☐ Special guests and honorees
- ☐ Fundraising elements: text-to-donate, online giving, live event thermometer
- ☐ Creative elements (auction, cooking class, games, etc.)
- ☐ Entertainment (live or pre-recorded)
- ☐ Livestreaming or recordings (optional)
- ☐ Interactive elements (optional)
- ☐ Sponsorship levels, pricing and benefits
- ☐ Use of Table Captains/Hosts
- ☐ SWAG or giveaways
- ☐ Promotional strategies (see Promotional section)

💡 **BONUS TIP**

Start planning your fundraising event early, **4-6 months ahead of time** is ideal to get all your pieces in place.
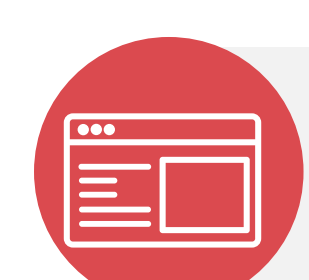
▶ PRE-EVENT ACTIONS

- ☐ Set up Event Page (see Event Page section)
- ☐ Set up online giving form
- ☐ Set up a ticketing, registration or RSVP form
- ☐ Set up sponsorship packages and information
- ☐ Create promoted sponsor area with links from their logos
- ☐ Customize confirmation page
- ☐ Set up automated tax receipt and thank you email
- ☐ Set up automated message with event details sent when guests register
- ☐ Develop a presentation or videos of mission, impact, beneficiaries, etc.
- ☐ Outline your event program
- ☐ Write out call-to-action scripts
- ☐ Record and edit any video elements
- ☐ Engage board members to spread the word
- ☐ Recruit peer-to-peer fundraisers (optional)
- ☐ Set-up peer-to-peer fundraising pages (optional)
- ☐ Recruit sponsors
- ☐ Create and send peer-to-peer fundraising toolkits (optional)
- ☐ Recruit Table Captains/Hosts (optional)

▶ INCLUDE ON EVENT PAGE

- ☐ Event details
- ☐ Short description of event
- ☐ Donation form
- ☐ Impact levels (amount, description, image)
- ☐ Registration or ticket form
- ☐ Sponsorship forms with levels, names and amounts
- ☐ Sponsor logos and links
- ☐ Impactful images of mission and/or beneficiaries
- ☐ Pre-recorded videos
- ☐ Livestream link (optional)
- ☐ Text-to-donate keyword and shortcode
- ☐ Website link
- ☐ Social media links
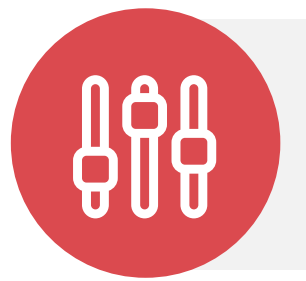
▶ TECH AND TOOLS

- ☐ Sound/Microphone(s)
- ☐ Lighting
- ☐ Projection Equipment and Screen
- ☐ Camera(s)
- ☐ Video playback equipment
- ☐ Lectern
- ☐ Branded text-to-donate keyword and shortcode
- ☐ Live event thermometer, progress bar or progress circle
- ☐ Donor wall or activity wall

Livestreaming or Recording Options:
- ☐ Streaming software
- ☐ Streaming platform
- ☐ Device(s) with which to record and/or livestream
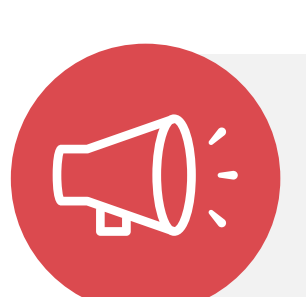
▶ PROMOTIONAL PLANNING

- ☐ Create Save the Dates (paper or electronic)
- ☐ Send Save the Dates (paper or electronic)
- ☐ Create invitations (paper or electronic)
- ☐ Send invitations (paper or electronic)
- ☐ Create promotional calendar
- ☐ Establish hashtag for social media sharing
- ☐ Write email, text and social media promotional messages
- ☐ Compose reminder messages
- ☐ Pre-schedule messages
- ☐ Compose thank you messages
- ☐ Pre-schedule thank you messages
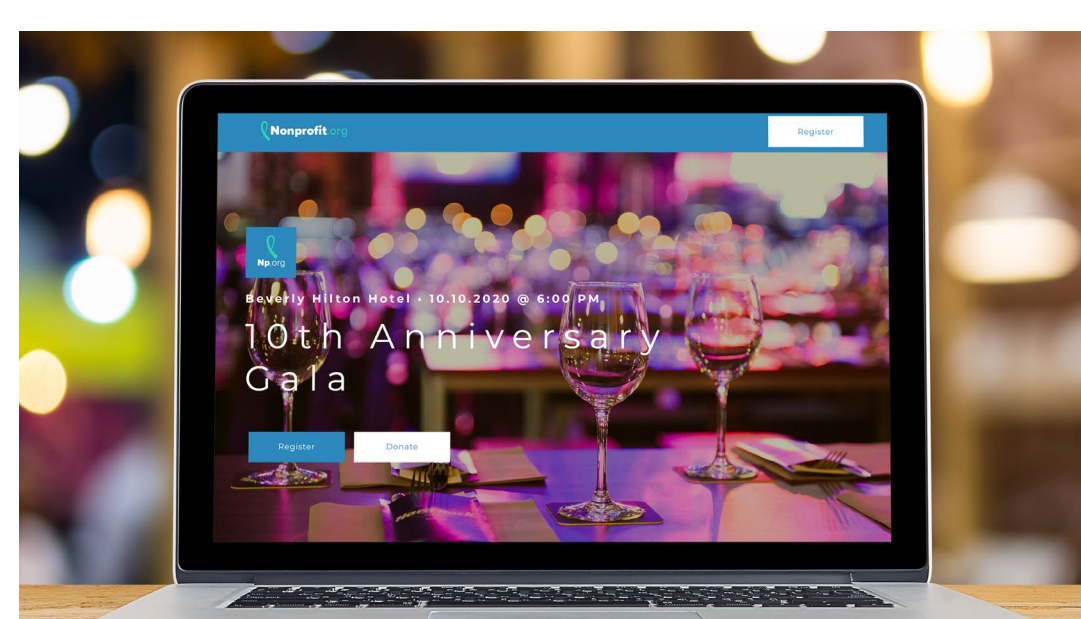
Be sure to grab **The Essential Fundraising Event Checklist: Implementation** to help you execute a flawless event at **mobilecause.me/eventchecklist2**

As you get ready for your next fundraising event, whatever type it may be, we hope this handy checklist helps you **save time and keep your planning organized and on track for success.**

MobileCause is more than simply comprehensive online and event fundraising software. We offer nonprofits one-on-one expert strategy from our Digital Fundraising Specialists plus 24/7 customer support that's there when you need it most. MobileCause has become the trusted fundraising partner for nonprofits looking to scale their fundraising quickly and efficiently, without paying any transaction fees, so you can grow your mission like never before.

To speak directly to a fundraising consultant about implementing MobileCause fundraising and communication software and strategy for your nonprofit, please call **(888) 661-8804** or visit **mobilecause.com** to request a demo.

Source:
1. 2018 Global Trends in Giving Report
2. "The Ultimate List Of Charitable Giving Statistics For 2018." Nonprofits Source.
3. "How 500 Nonprofits Are Fundraising With Events in 2019." EventBrite. January, 2019.