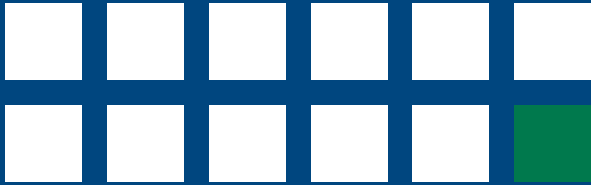




FUNDRAISING GUIDE



SERVICE. DRIVEN. FUNDRAISING.

greatergiving.com

THIS MONTH

REVIEW RESULTS

Review results from your fundraising event.

Discuss the following aspects of your event in detail:

- Overall revenue goal
- Performance of ticket sales, auction, special appeal, and sponsorships
- Event logistics
- Event program
- Donor relationships

THANK GUESTS

Thank event guests for attending your fundraiser.

Information can be shared in a letter or with a phone call. Be sure to share revenue results and what funds raised will be supporting.

THANK SPONSORS

Thank sponsors for supporting your event.

Ways to say thank you:

- Personalized letter or card
- Hosting a dinner or lunch for sponsors
- Send a small gift like a cookie platter or gift basket

You may also want to conduct in person meetings with sponsors to follow-up and receive feedback. This is key to build an ongoing relationship with your sponsors.



USE THE SMART ACRONYM WHEN SETTING GOALS: SPECIFIC, MEASUREABLE, ACHIEVABLE, REALISTIC, AND TIME-TARGETED.

THANK VOLUNTEERS

Thank volunteers with a letter or handwritten card.

Consider including a small gift card and mentioning other volunteer opportunities that are upcoming.

SET A BUDGET

Define an event budget for next year's event using your past event(s) as a guide.

Budget items generally include:

- Venue
- Catering
- Auctioneer
- Entertainment
- Décor

SET GOALS

Set fundraising/revenue and procurement goals for next year's event.

If your organization's most recent event did not reach revenue goals, consider changing tactics or adding additional revenue sources to your plan. Use the SMART acronym when setting goals: specific, measureable, achievable, realistic, and time-targeted.

SOCIAL MEDIA

Post event recap on social media channels.

Create a Facebook photo album and include photos taken by guests using your event hashtag. Share fundraising total, thank you to attendees and major sponsors for attending on Facebook and Twitter. Remind donors one more time what funds raised will be supporting.

THIS MONTH

POST-EVENT SURVEY

Create, finalize, and send a post-event survey to guests. Once results are in, compile them to share with your staff, board and committee.

Ask guests for candid feedback on:

- Venue
- Food and Beverage
- Entertainment
- Auction
- Special Appeal
- Logistics

Ask for ideas of items they'd be eager to bid on at your next event.

Allow guests 2-3 weeks to complete the survey and send at least one reminder.

COMMITTEE THANK YOU

Host an event committee thank you and debrief event.

This is a great time to gather feedback including:

- Processes that worked well
- Improvements for the plan for next year
- Responsibilities and results of each committee's area

Be sure to ask committee members if they would be willing to volunteer their support again for next year's fundraiser.

COMMITTEE CHAIRS

Select an event chair for your committee.

Work closely with your chair to form committees and recruit committee members. Most common committee roles include:

- Guest recruitment
- Procurement
- Logistics
- Sponsorship
- Promotion and Ticket Sales
- Volunteers

When recruiting for each role, be sure the personality of the committee member fits their position.

HIRE AN AUCTIONEER

Hire a professional benefit auctioneer for next year's event.

Increase auction revenue by hiring a professional benefit auctioneer. These individuals boost auction revenue by promoting your cause as well as the items in your auction, motivating guests to give more.

VENDOR REVIEW

Evaluate vendor performance and make a decision on which vendors to use again next year.

Key vendors could include:

- Venue
- Catering
- AV
- Entertainment
- Auctioneer

THIS MONTH

■ NEXT YEAR

Select a venue and date for next year (if not already completed).

In many major cities, event venues frequently used for fundraisers book events more than a year in advance. Once you have found a venue that works well for your group, be sure to book early to avoid missing out.

■ PROCUREMENT STRATEGY

Conduct a meeting with your procurement team and committee chair to establish a procurement strategy. Be sure to create a realistic timeline.

■ COMMITTEE MEETINGS

Establish a set date and time for committee meetings. This allows your committee members to mark their calendars out months in advance.

■ BOARD RECAP

Provide your Board of Directors a detailed event recap based on your experience and the survey feedback. Ask Board Members to provide candid feedback on the event as well.

08.25



ESTABLISH A SET DATE AND TIME FOR COMMITTEE MEETINGS. THIS ALLOWS YOUR COMMITTEE MEMBERS TO MARK THEIR CALENDARS OUT MONTHS IN ADVANCE.

GREATER GIVING SOLUTIONS TIPS:

- Evaluate Mobile Bidding options for next year's event. Greater Giving Mobile Bidding connects directly to your Greater Giving project and can seamlessly integrate into your event, eliminating paper bid sheets and even increasing revenue.
- Consider your online strategy for event related promotion and fundraising. An online auction or peer-to-peer campaign could be a good fit to augment revenue.
- Research a Greater Giving Partner auctioneer or event planner, if you will need one in the upcoming year.
- For more information about Greater Giving products, please visit www.greatergiving.com.

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NEW TASKS

BUDGET & REVENUE

Finalize the event budget and revenue sources.

Save money where possible, without compromising the guest experience you want to provide.

Determine committee budgets where appropriate and communicate the budget with the committee member.

THEME

Determine if a theme is right for your event.

Not all events have a theme. However, a theme can provide added excitement and energy to your event. Discuss this idea with your event committee in detail.

DONATION REQUEST

Develop a donation request letter and item donation form for procurement.

These forms will allow committee members and volunteers to discuss item donation with businesses they come in contact with across your community.

Other materials for the procurement team could include:

- Description of the procurement process
- List of key contacts
- Targeted items
- Suggested email content
- Script to use when asking for donations

PROCUREMENT

Create a procurement brainstorm list with staff and committee members.

Identify hot items to target that have done well in the past for your organizations or others in your area. Once you have a preliminary list, brainstorm to find connections committee members, staff, and board may have to procure items on your list.

SPONSORSHIPS

Develop a sponsorship request letter and confirmation form.

Create a list of sponsors to target.

ORGANIZE

Create and keep an event binder so that all information is in one central location. Update donor, sponsor, and vendor contact information.

EVENT PROGRAM

Begin planning for the event program and speakers. Start jotting down ideas, including special appeal strategy.

Work with program staff to gather statistics, identify constituents, and define possible messaging for your event.

BOARD OF DIRECTORS

Review your Board member list, including members' backgrounds and expertise. Determine how to engage with each Board member to drive event success by leveraging their connections and resources. Jot down notes related to each member to prompt when making your follow-up calls. If you have Trustee Agreements, review them before speaking to the members.

Limit your request for each Board member to one or two that they can deliver in a short time frame. Be sure to communicate deadlines and contingencies to keep members focused. For creative ways to involve your Board in event-based fundraising, visit the Greater Giving blog.

ONGOING TASKS

EVENT COMMITTEE

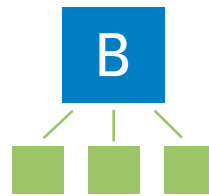
Event Committee “Kickoff” Meeting. Use this time to create an event fundraising community, to share information and allow members to get to know each other.

- Review post-event survey results
- Discuss recruitment of additional committee members
- Establish a strategy and timeline with each of your committee groups
- Create a contact list for all committee members and share with the group
- Discuss and add to the procurement brainstorming list
- Finalize committee chairs

PROCUREMENT

VENDORS

Begin to collect contracts and pay deposits.



DETERMINE HOW TO ENGAGE WITH EACH BOARD MEMBER TO DRIVE EVENT SUCCESS BY LEVERAGING THEIR CONNECTIONS AND RESOURCES.

GREATER GIVING PRODUCT TIPS:

- Create a new project in Greater Giving Event Software Online.
- Set up your committee members and staff in the appropriate teams in your Greater Giving Online project.

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NEW TASKS

■ SET PRICES

Set ticket and table prices.

Your ticket price sets a certain level of expectation about your event.

■ SAVE THE DATE

Send an electronic save the date to your donor database. Include a link to your item donation page and sponsorship form on your event website.

■ MESSAGING

Write the event promotional messaging.

Taking the time to write content will ensure material and messaging are consistent. Content to write could include:

- Save the Date
- Invitation
- Website copy
- Registration confirmation
- Reminder Emails
- Catalog copy (except for auction package descriptions)

■ EVENT GRAPHICS

Begin creating or editing event graphics.

Hire a graphic designer or graphic artist to create a signature look for your event. Use these graphics for all aspects of your event, including printed materials, event website, and social media.



HIRE A GRAPHIC DESIGNER OR GRAPHIC ARTIST TO CREATE A SIGNATURE LOOK FOR YOUR EVENT.

ONGOING TASKS

EVENT COMMITTEE

- Finalize committee plans and timelines. Note key dates on your calendar to stay current on progress.
- Empower your committee to give your organization's elevator pitch.

PROCUREMENT

Get asking! Provide your procurement committee a way to keep track of items collected.

SPONSORSHIPS

- Collect sponsor logos that are high-resolution to be used in print and on your event website.
- Distribute your sponsorship packet to local businesses.

BOARD OF DIRECTORS

Engage your Board to support the event, especially from a procurement and sponsorship perspective. Provide your board with procurement and sponsorship packets similar to those given to the event committee.

VENDORS

Ensure vendor contracts are in-place.

Review contracts in great detail before agreeing.

If you are using a new venue, consider making an appointment to do a detailed walk through of the venue keeping in mind where you will set up registration, silent auction, bar/s, tables and stage. Also discuss lighting and sound with your venue as it is a key piece of event night.

GREATER GIVING PRODUCT TIPS:

- Create an online donation form on your website so individuals can donate items to your auction.
- Familiarize yourself with Greater Giving Online if you are using it for the first time. Greater Giving Client Services hosts a free training webinar each Tuesday at 10:00 AM Pacific. If any of your event committee members will be using the software, it would be a good time to start their training as well.
- Create a log-in specific for your procurement team that will allow them to update items donated for your auction.

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NEW TASKS

STORAGE

Locate a convenient space to store procured items.

Your item storage space should be dry and cool for items like wine, as well as secure. Limit the number of people with access and implement a mandatory system for sign-in and sign-out of the area. Establish item intake days and times and work with your staff to develop an inventory system so you are prepared to take donated items and track them.

SOUND & LIGHTING

If your event requires professional sound and lighting that your venue cannot provide, look for a professional vendor.

Ask your venue, other local nonprofits, or your Board for vendor recommendations. Also use Yelp and Angie's List. Ideally the vendor you hire will have experience with fundraising events.

TRANSPORTATION

Consider guest parking; if it looks to be complex, determine how you will transport guests to and from the venue and make appropriate arrangements.

Add this information to the event website and future communications.

BOARD UPDATE

Prepare and send a report to your Board regarding event updates.

Avoid covering operational and tactical issues when reporting; stick with the strategic and revenue-related issues to keep their attention!



IF YOUR EVENT REQUIRES PROFESSIONAL SOUND AND LIGHTING THAT YOUR VENUE CANNOT PROVIDE, LOOK FOR A PROFESSIONAL VENDOR

ONGOING TASKS

EVENT COMMITTEE

PROCUREMENT

SPONSORSHIPS

Support your committee in making asks of key business contacts. Make yourself or your director available for any key sponsor meetings.

BOARD OF DIRECTORS

VENDORS

PROGRAM

Begin program speaker outreach.

Draft an event program outline. Include information like:

- Program length
- Start time
- Video or presentation requirements
- AV support
- Honorees
- Venue support
- AV firm
- Speaker placement into the program

GREATER GIVING PRODUCT TIPS:

- Track procured items in Greater Giving Event Software Online.
- Tie the item's physical check-in process to item data entry in Greater Giving Event Software online to make tracking even easier.
- For ideas on décor, revenue generators, unique auction items and more, check out the Greater Giving blog and Pinterest page!

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NEW TASKS

■ SPECIAL APPEAL

Gather staff and define the event special appeal strategy. Develop the story, including defining “the need”, identifying representative constituent, and making notes of the constituent’s story.

Consider how the special appeal will affect your event program, such as adding a speaker to make the program more compelling.

■ SPEAKER/S

Begin program speaker outreach.

Set up a meeting with the constituent identified to be a part of your special appeal. Confirm their availability and willingness to take a platform on behalf of your organization. Commitment to speaking may include being a part of a short video, practice sessions before the event, and a dress rehearsal for event night.



SET UP A MEETING WITH THE CONSTITUENT IDENTIFIED TO BE A PART OF YOUR SPECIAL APPEAL. CONFIRM THEIR WILLINGNESS TO TAKE A PLATFORM ON BEHALF OF YOUR ORGANIZATION.

■ MATCH

Begin the process of finding matching challenges to be utilized during your special appeal.

■ VOLUNTEERS

Working with your volunteer and logistics committees, determine your volunteer needs for the week of your event and event night. Develop a volunteer roles list, including role requirements and time commitment.

7 MONTHS TO YOUR EVENT

ONGOING TASKS

EVENT COMMITTEE

Plan event night décor.

PROCUREMENT

Keep detailed notes of the items that are coming in. Begin to plan with your Procurement team some possible auction packages pairing together items in unique and interesting ways.

SPONSORSHIPS

If the sponsorship committee is not on track, schedule a call or meeting to uncover issues and rejuvenate the team.

VENDORS

PROGRAM

Once defined, discuss the special appeal story and goal with your auctioneer.

GREATER GIVING SOLUTIONS TIPS:

- Using Greater Giving Event Software Online, you can conduct an easy status-check by reviewing the sponsor dashboard.
- Track sponsor recruitment through Greater Giving Event Software Online.

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NEW TASKS

REVENUE BUILDERS

Brainstorm additional revenue opportunities for the gala. Possible items include a signature cocktail and/or dessert, a premium bottle of wine to enjoy with dinner, a raffle, or retail items.

A retail shop could be a unique way to allow event guests to purchase items with your organization's logo, or made by the constituents you serve.

REVENUE BUILDER PROCUREMENT

Determine what additional items (if any) you will need to procure to provide additional revenue opportunities at your event.

To procure a signature dessert, reach out to a local restaurant or bakery and ask for a donation to be sold at the event. Include a promotion of the chef and the restaurant or bakery in promotional materials. Use the same approach for a signature cocktail.

EMCEE

Discuss candidates for event night emcee, select a top candidate, and ask them to emcee your event.

The emcee is a key element to your event night program. A good emcee will set the tone of the evening, introduce speakers, maintain the guest's focus, keep the program moving, and generate excitement and empathy from guests.

EVENT WEBSITE

Update event website, including sponsors and details about the program. Begin online ticket and table sales.



UPDATE EVENT WEBSITE, INCLUDING SPONSORS AND DETAILS ABOUT THE PROGRAM. BEGIN ONLINE TICKET AND TABLE SALES.

ONGOING TASKS

■ EVENT COMMITTEE

■ PROCUREMENT

Keep detailed notes of the items that are coming in. Begin to plan with your Procurement team some possible auction packages pairing together items in unique and interesting ways. Keep in mind the fair market value of items you are packaging.

■ SPONSORSHIPS

If the sponsorship committee is not on track, schedule a call or meeting to uncover issues and rejuvenate the team.

■ BOARD OF DIRECTORS

Sponsorship Update
Individual event-related commitments

■ VENDORS

■ PROGRAM

Review your program outline. Be sure that you list accomplishments for guest knowledge like if you are celebrating a milestone, honoring someone or highlighting a new program or campaign.

GREATER GIVING TIPS:

- Check out additional event night revenue source ideas on the Greater Giving Blog.

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NEW TASKS

MAILING LIST

Review your contact mailing list to prepare for mailing your Save the Date.

SAVE THE DATE

Send a printed Save the Date to your donor database.

If you don't already have an account, non-profit bulk mail can help you save funds mailing materials to donors.

EQUIPMENT

Plan for event night technology solutions.

How will you handle check-in and out and what technology equipment will you need?

2 DAY TIMELINE

Draft an event timeline for the day before and the day of your event.

CONNECT WITH DONORS

Begin scheduling coffee or lunch meetings with Board members and top donors to discuss updates with your organization.

It is important to connect with donors a few times each year to not ask them for donations and simply update them on the work your organization is doing.

APPEAL VIDEO

If your program or special appeal includes a video, work with your vendor to complete a script and storyboard.

Work with your vendor to ensure that the video creates empathy with guests and drives giving. Set a goal to have the video complete one month in advance of the event to allow you to preview it with staff and committee members.



BEGIN SCHEDULING COFFEE OR LUNCH MEETINGS WITH BOARD MEMBERS AND TOP DONORS TO DISCUSS UPDATES WITH YOUR ORGANIZATION

ONGOING TASKS

EVENT COMMITTEE

PROCUREMENT

Conduct an inventory of auction items that have been procured.

Compare the list of procured items against your wish list and procurement plan.

Use social media to procure additional items for your auction by sharing your website donation link.

SPONSORSHIPS

Continue efforts to find Special Appeal matching dollars.

BOARD OF DIRECTORS

Monthly report:

- Sponsorships
- Procurement
- Ticket Sales
- Program

VENDORS

Meet with the event catering company and discuss menu selections.

Schedule a venue walk-through for next month.

PROGRAM

Meet with your event night speaker again to confirm availability and discuss any pertinent details.

GREATER GIVING TIPS:

- After meetings with Board members and donors, track who was there, what was discussed, and any next steps for follow-up.

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NEW TASKS

VENUE WALK-THROUGH

Conduct a detailed walk-through of your event venue. Share and review your event day timeline with your caterer and venue.

Address issues before they happen. Cover every aspect of your event in as much detail as possible and consider how your findings will affect guests' and volunteers' experience, your program, event operations, vendors, etc. Keep in mind the areas you identified to improve from last year's event.

CONFIRMATION EMAIL

Draft a final confirmation email for registered guests that shares important venue or event details. Send this email a few weeks prior to the event.

Details may include:

- Parking
- Menu
- Silent auction open/close times
- Program time
- Mobile bidding information

PROGRAM SCHEDULE

Build an event night program schedule. Send the pertinent dates to your speaker/s and emcee.

VOLUNTEER RECRUITMENT

Begin a strong volunteer recruitment effort for event night. Post a call for volunteers on your event website and social media.

Based on your volunteer plan, begin seeking out volunteers for event night. Consider having multiple time blocks for volunteers (set-up, cocktail hour, dinner/auction, and post event) giving volunteers the ability to work in a time shift that is best for their schedule.

AUCTIONEER MEETING

Set up a meeting with your auctioneer to review event night timeline, procurement status, and special appeal.

Confirm the services your auctioneer is providing and their audio visual and personnel requirements.

AUCTION VOLUNTEERS

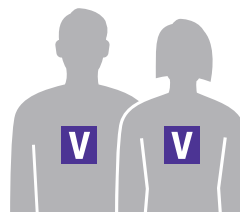
If your auctioneer will need assistance from volunteers on event night, inform your volunteer committee and make sure those requirements are added to the volunteer plan.

BANKING

Define your event banking procedures.

GOALS & BUDGET REVIEW

Review your event goals and budget established at the beginning of the planning process. Make sure things are on track.



BEGIN A STRONG VOLUNTEER RECRUITMENT EFFORT FOR EVENT NIGHT. POST A CALL FOR VOLUNTEERS ON YOUR EVENT WEBSITE AND SOCIAL MEDIA.

ONGOING TASKS

■ EVENT COMMITTEE

■ PROCUREMENT

Conduct an inventory of auction items that have been procured.

Compare the list of procured items against your wish list and procurement plan.

■ SPONSORSHIPS

Begin collecting guest names for sponsor tables.

Make sure that signed sponsors are receiving the sponsorship benefits due to them, like logos posted on event website or social media shout-outs.

■ BOARD OF DIRECTORS

Monthly report:

- Sponsorships
- Procurement
- Ticket Sales
- Program

■ VENDORS

Re-confirm contracts with all vendors. Be sure to double check each line item.

■ PROGRAM

Schedule your program rehearsal and dress rehearsal with your emcee, speaker, and auctioneer.

GREATER GIVING TIPS:

- Plan to check your venue's WIFI and mobile connectivity if you are using Mobile Bidding.
- Consider adding Greater Giving Professional Event Services.

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NEW TASKS

FACEBOOK EVENT

Create a Facebook page for your event.

Post event date and location. Include a link to purchase tickets, tables, and become a sponsor.

SOCIAL MEDIA

Start tweeting about your event on a daily basis. Coordinate your tweets with your Facebook postings. Be sure to use an event hashtag (e.g. #evergreengala).

Use a platform to coordinate your social media posts like Co-Schedule or Hootsuite.

REMINDER EMAIL

Send an event reminder email to your contacts who have not yet registered.

VOLUNTEER ASSIGNMENTS

Start assigning volunteer recruits to various roles for your event.

SPECIAL APPEAL

Begin strategizing to maximize your event special appeal results by conducting a special appeal mapping exercise.

The mapping exercise is used to work through all the levels of giving you plan to announce to guests and discuss which donor/s you believe will be giving at each level.

FORMAL INVITATION

Complete the design and printing of your formal event invitation.

Formal event invitations, whether printed or electronic, should be sent a minimum of six weeks in advance of the event. Make a few extra copies to keep at your office and hand out as needed to invite new contacts.



START TWEETING ABOUT YOUR EVENT ON A DAILY BASIS. COORDINATE YOUR TWEETS WITH YOUR FACEBOOK POSTINGS.



FORMAL EVENT INVITATIONS, WHETHER PRINTED OR ELECTRONIC, SHOULD BE SENT A MINIMUM OF SIX WEEKS IN ADVANCE OF THE EVENT.

ONGOING TASKS

EVENT COMMITTEE

Run a status report on registration, procurement, and sponsorship and share the status with committee members.
Begin recruiting for next year's event chair.

PROCUREMENT

Keep your list of procured items up to date.
Update procurement plan.
Keep track of physical inventory to procured items list-make arrangements to collect any missing items.

SPONSORSHIPS

Continue to recruit new businesses to fill remaining sponsorship levels.

BOARD OF DIRECTORS

Monthly report:

- Sponsorships
- Procurement
- Ticket Sales
- Program

VENDORS

Keep your catering company up to date on your registration level so they are informed.

PROGRAM

Using your event night program outline, begin drafting the program content. Focus first on the program elements that will take the longest to prepare. For example—videos and slideshows.

GREATER GIVING TIPS:

- Order your event night equipment and services from Greater Giving

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NEW TASKS

DONOR FOLLOW-UP

Follow up with board members and top donors to discuss their special appeal donation level.

APPEAL VIDEO

Check on progress with the vendor producing your event night video.

INVITATION

Mail or email your formal event invitation.

Send to everyone on your contact list, including those already registered. The invitation will set the tone for how formal your event is; be sure it fits your plan and theme.

PLAN FOR NEXT YEAR

Select venue candidates for next year's event. The earlier in the planning process you select your event venue, the more available dates you'll have from which to select.

When looking at dates, consider those that are in-demand like holidays, major sporting events, and civic events that may conflict. If you have the venue selected for next year, you'll be able to announce next year's date and location at this year's event to establish mindshare with your guests for next year.

CHECK-IN AND OUT

Outline check-in and check-out procedures.

LIVE VIDEO

Consider adding live video feed for event night.

Live video feed can enhance engagement for event night guests and create an exciting bidding environment. Many videographers also have the ability to record your auction, giving you the ability to re-watch event night.

PHOTOGRAPHER

Hire or recruit a volunteer to be the event night photographer.

The photographer will capture key pieces of your event like guests, auction, and special appeal. Having high quality photos to use after your event is important to continue your event momentum and create a strong press release.

SAVE
THE
DATE

IF YOU HAVE THE VENUE SELECTED FOR NEXT YEAR, YOU'LL BE ABLE TO ANNOUNCE NEXT YEAR'S DATE AND LOCATION AT THIS YEAR'S EVENT.

ONGOING TASKS

EVENT COMMITTEE

Ask current committee members to volunteer for next year's event.

PROCUREMENT

- Keep your list of procured items up to date
- Update procurement plan
- Keep track of physical inventory to procured items list—make arrangements to collect any missing items
- Continue to write and update auction package description

SPONSORSHIPS

- Close final sponsorship deals
- Run update report

BOARD OF DIRECTORS

Monthly report:

- Sponsorships
- Procurement
- Ticket Sales
- Program

VENDORS

Meet with auctioneer to review procured packages and begin to set the live auction order and starting bid amount.

PROGRAM

Complete event night program and script and review with staff and trusted volunteers.

ITEM 1 

ITEM 2 

ITEM 3 

MEET WITH AUCTIONEER TO REVIEW PROCURED PACKAGES AND BEGIN TO SET THE LIVE AUCTION ORDER AND STARTING BID AMOUNT.

GREATER GIVING TIPS:

- Consider incorporating an online auction before or after your event.

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NEW TASKS

REMINDER EMAIL

Send an email to supporters who haven't yet registered with the registration link.

Make sure that the event registration cutoff date is clearly posted and highlighted on your website.

REGISTRATIONS

Review tables sold and the numbers of registered guests at each.

If a table isn't filled, contact the table host to discuss their plan for filling their other seats.

VOLUNTEERS

Meet with your volunteer committee to review list of those volunteering on event night. Revisit the volunteer roles list and assignments. Conduct a status check on volunteer recruitment and work assignments.

Identify experienced volunteers as potential team leads. Be sure that the volunteer's personality matches their assigned job—if the role is to sell raffle tickets a shy more reserved volunteer might not be a good fit. Email volunteers important event details and have them reply to confirm their attendance.



PREPARE A STRUCTURED, SPECIFIC TIMELINE FOR THE DAY PRIOR TO THE EVENT, DAY OF EVENT, AND EVENT NIGHT.

POST-EVENT

Develop the post-event survey and follow-up plan.

Measure guest satisfaction with the venue, food & beverage, entertainment, auctioneer, auction items, special appeal and logistics. Ask guests what items they'd buy from next year's auction to get a head start on procurement.

CONTENT CHECK

Update information on auction receipts, guest lists, and catalog descriptions to be sure they are error free.

ITEM PICK-UP

Develop the plan for item pick-up and ask staff to review.

TIMELINES

Prepare a structured, specific timeline for the day prior to the event, day of event, and event night. List in the appropriate section of the timeline what tasks and activities will be taking place.

A timeline will keep everyone on track and in sync, from vendors to staff and volunteers. Put a plan in place for post-event cleaning and equipment transportation.

NEXT YEAR

Finalize the date and venue for next year.

Promote next year's event with this year's guests, and announce it at the end of the event.

ONGOING TASKS

EVENT COMMITTEE

PROCUREMENT

- Keep your list of procured items up to date
- Update procurement plan
- Keep track of physical inventory to procured items list-make arrangements to collect any missing items
- Write final auction package descriptions and collect photos to use for the auction program book. Use photos that will create appeal and allow donors to envision winning the package.

SPONSORSHIPS

- Review all sponsorships
- Be sure that sponsors are receiving all promised benefits.
- Continue collecting sponsor guest names. Give them a clear deadline to have guest names in by.

BOARD OF DIRECTORS

Monthly report:

- Sponsorships
- Procurement
- Ticket Sales
- Program

VENDORS

Schedule your final venue walk through for a week or two before the event. Include AV crew, catering company, and venue staff.

PROGRAM

Review your Special Appeal video

GREATER GIVING TIPS:

- If you want to add one-of-a-kind travel and experience packages to your auction, consider adding a few Greater Giving Auction Boosters. You can reserve them for your event risk-free.

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NEW TASKS

SCRIPT

Write the final script for all the event, even silent auction announcements and program transitions. Do you have enough speakers to cover all the speaking roles you defined in the script?

As you're writing the script, read it aloud to ensure that it flows smoothly to cut down on event night errors. Scripts should include speeches and remarks, which speaker is saying what, where in the timeline the script elements occur, stage direction, transitions, cues, lighting, props (if any), camera direction for live feed, speaker, video, and PowerPoint order.

SOCIAL MEDIA

Continue to post on Facebook and be tweeting about your event.

Making frequent event-related posts on social media will help drive last minute registrations and get guests excited about the event. Consider sending auction package teasers, details on catering or signature cocktails, and giving sponsors and major donors special shout-outs.

VOLUNTEERS

Send each volunteer an event reminder, their assignment, and instructions.

Volunteer communication should include:

- Job
- Event location
- Parking
- Arrival time
- Attire
- Supplies to bring
- Snacks/meals
- Background on your organization
- Contact number in case of emergency

Not enough volunteers? Make a specific list of the roles you still need to fill and push to recruit for those roles.

TABLE CAPTAINS

Check in with table captains or hosts and sponsors for status on filling their tables.

If they haven't filled their seats, brainstorm ways to fill seats. Having guests in every seat will drive bidding-and your event revenue.

GUEST EMAIL

Send a final event night confirmation email to registered guests.

Include details about parking, closing times for silent auction packages, and links to promote the event on their social media pages.

CATALOG

Finalize and print your auction catalog.

Be sure to review a print version of your catalog to catch any small errors or typos.

PROGRAM SPEAKERS

Confirm speakers—emcee, special appeal speaker/s. Review the event night timeline and script in detail at your program rehearsal.

After rehearsal make any final edits to the event night script. Be sure to print numerous copies to have on event night.



WRITE THE FINAL SCRIPT FOR ALL THE EVENT, EVEN SILENT AUCTION ANNOUNCEMENTS AND PROGRAM TRANSITIONS.

NEW TASKS

■ AUCTION STAGING

Brainstorm silent auction staging including signage, presentation, and props. Make a list of supplies needed, assign a small team to obtain those items, and schedule a 'staging party' to assemble the silent auction.

Schedule several hours and consider hosting the party after business hours and providing refreshments to make it fun.

■ POST AUCTION CATALOG

Post all or some of your auction catalog online. Email a link to the catalog to event guests and invitees as a final push to sell event tickets.

■ GATHER SUPPLIES

Develop supply checklists for audio visual, check-in and out, information desk, etc.

For example, your audio visual checklist may include videos, script, PowerPoints, CD/iPod playlists, power cords, and carpet tape.

Assemble and store checklist items so you can 'grab and go' the day of the event.



SEND A 'LAST CHANCE TO REGISTER' EMAIL TO YOUR MAILING LIST. IN THE COMMUNICATION SHARE A DONATION LINK FOR THOSE WHO AREN'T ABLE TO ATTEND.

■ APPEAL VIDEO

View the final video to be shown on event night.

Offer a 'sneak preview' to staff and volunteers if possible. It will energize them right before the event.

■ FINAL REGISTRATIONS

Review the guest list and conduct a final recruitment push.

Compile a list of individuals who haven't registered but made a commitment to do so. Drive last-minute guest registration by conducting a call down to those on the list.

Send a 'last chance to register' email to your mailing list, minus those who have already registered. In the communication share a donation link for those who aren't able to attend.

■ SEATING CHART

Create a guest table seating chart. Note sponsor tables and give them preferred placement. Rather than scatter guests among tables fill every seat at a table before seating guests at a new table. Once final, print a few copies of the seating chart to give to key staff and volunteers.

It's OK to eliminate tables if needed. An event space with full tables looks better than an event space with more tables that are partially empty. Full tables are more festive, with more interaction among guests. And at a full table bidders egg each other on to bid more.

NEW TASKS

STAGING PARTY

Conduct an item staging party. Determine how all items will be transported to the venue. If your venue permits you to deliver items prior to the day of event, ask how they will secure the items until event night.

Pack office supplies in a 'grab and go' kit. Bring the following:

- Scissors
- Clipboards with paper
- Stapler
- Packing tape
- Calculator
- Pens
- Printer paper
- Money box
- Swiss army knife or Leatherman
- Duct tape



PROVIDE YOUR PHOTOGRAPHER WITH A 'SHOT LIST' AND ON-SITE CONTACT INFORMATION.

PHOTOGRAPHER

Provide your photographer with a 'shot list' and on-site contact information. Make sure your venue knows you will have a photographer on-site.

Instruct your photographer to arrive enough in advance of the event start time to perform a venue walk-through. Your shot list should include Board members, honorees, VIPs, sponsors, key moments, and event elements like live auction, silent auction displays, and centerpieces.

PRINTING

Be sure the following materials are being printed (if needed):

- Directional signboards
- Bidder numbers
- Auction booklets
- Table numbers
- Menu cards
- Bar signs
- Silent auction bid sheets
- Raffle ticket sale recording sheets

ONGOING TASKS

EVENT COMMITTEE

Schedule a post-event review with staff and the committee.

Finalize committee roles for event night and say 'thank you' for all their hard work.

PROCUREMENT

Cut off procurement a minimum of two weeks prior to the event. This will allow you time to creatively package items, assign items to your live or silent auction, and finalize the auction catalog.

Package items for the silent auction and write final live and silent auction package descriptions.

ONGOING TASKS

SPONSORSHIPS

Be sure you've collected guest information for each sponsor tables.

BOARD OF DIRECTORS

Final Report:

- Sponsorships
- Procurement
- Ticket Sales
- Program
- Review table arrangements and guest list
- Give Board Members a specific event night task like talking with a VIP or sponsor, or leading a level of giving for your special appeal

VENDORS

- Review event night timeline and auction packages with your benefit auctioneer.
- Confirm venue, including setup, AV, and catering.
- Visit the venue for one final on-site walk-through.
- Review all vendor contracts one final time to ensure you're in compliance with any contractual obligations.
- Confirm and run-through the final timeline with all vendors.
- Provide your catering company with final food and beverage counts.

PROGRAM

Develop and finalize all program elements like videos and PowerPoint presentations.

GREATER GIVING SOLUTIONS TIPS:

- Confirm Auctionpay equipment ordered with Greater Giving. To reduce wait times during registration, plan for one registration station for every 100 guests.
- If needed, plan for tech support for guest registration and check-out.
- Complete all data entry in your Greater Giving project.
- Set up and test Auctionpay card readers with the system you are using for check-in.
- Be sure that these resources are prepared for event night: passwords for computers and your Greater Giving Online Project (create a specific log-in for all your volunteers to use).

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