



## Planning a Successful Fundraising Event

### 12 months or more

- Start with an idea**

Events don't need to be complicated, go with something fun and unique people are interested in. Would you attend this event? Would your board members? The answer should be yes!

- Establish goals & create a budget**

What do you want to achieve and how much money do you want to raise? Set both financial and non-financial goals to ensure you stay on track with the event. \*Important\* Create a budget and set attainable financial goals. Ensure your budget includes both revenue and expense lines and track everything!

- Create a committee**

Surround yourself with people dedicated to your cause and who are not afraid to ask and/or introduce you to contacts. This committee should be a **fundraising committee**, not one who likes to pick the colours of the napkins!

### 9 – 12 months

- Book the date & venue**

Do an event scan to see if there are other things happening on the same day - you don't want to be competing for guests. Prepare and send out your venue RFP to consider different venue spaces. In our opinion, convention centres can be stale but many find them more turn-key.... It is important to understand what will motivate your guests to purchase tickets. We believe the venue is a major component to this!



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**Determine the sponsorship strategy**

It's time to get serious about sponsorship! Build your pipeline – who wants to reach your audience? Create a sponsorship grid with the benefits you can provide sponsors, book meetings, and then send your package based on the conversation with the sponsor.

**Event Marketing**

Will your event have its own logo, specific look, feel? We encourage you to work with a designer to create an event logo and/or design.

**Confirm fundraising activities**

How will you raise money at your event? Will you do a live auction, wine wall, raffle (please get a license!), golden ticket, heads & tails or Fund-a-Need? Based on the budget you set consider which on-site revenue generating activities will offer you the most ROI. We encourage you to do no more than 3-4 of these and remember to price them at different amounts based on the prize.

**Book suppliers**

Will you need AV, Auctioneer, décor, photographer, etc?

## **6 – 9 months**

**Sponsorship Solicitation**

With all the prep work done you should be getting out for meetings with prospective sponsors and talking to them about how your event will help them reach their market. Lots of meetings and following up during this time!

**Create a marketing & communications plan**

Think about who you are targeting and how they best receive information – email, Facebook, twitter or printed materials, then create a work back schedule for all collateral you will need.



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## 6 – 3 months

### Solicit items for your on-site fundraising

This is the time to be hitting the pavement and gathering donations for your on-site revenue generating activities. Be specific in your requests to ensure you are receiving items which will help you raise the most amount of money.

### Ticket Sales Open

A very exciting time in the planning process – ticket sales are open! Your sponsorship tickets have all been allocated and now you can sell to the public. Ensure you make this process as clear and simple for people. Personally, we like Eventbrite but there are lots of options out there.

## 3 months – Event Day

### Logistics, Logistics, Logistics

You may still be selling those final tickets but really it is time to ensure you are covering everything you need with your suppliers for a well-executed event. This means floor plans, menu finalization, final A/V, décor and rental needs and creating your production schedule as well as your tie down meeting. The focus is on guest experience and having all suppliers on the same page is key.

### Volunteer Recruitment

How many volunteers do you need, where will you get them and what jobs will they be doing? Ensure you have job descriptions, a recruitment plan and an event schedule to slot volunteers in and start recruiting!

### On-site collateral

In the final months of planning your event specific collateral will be a focus. Ensure you have communicated your needs and timelines with your designer and printer and don't forget to build in lots of time for edits!



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## Day after Event – 6 weeks post event

- **Steward your donors, sponsors & volunteers**

This really is an ongoing task but especially important post-event. Building positive relationships is the key to making a fundraising event a success. Tell your donors and sponsors the impact of their gift.

- **Tax receipts**

This is when the finance team (or person) kicks into gear! Processing gifts and issuing tax receipts in a timely manner.

- **Final invoices**

Make sure you have collected any outstanding payments and ensure you have paid all your final invoices so you can figure out the total NET proceeds your event raised.

- **Event Report**

Evaluate your event. What worked and what did not go how you thought? How were your suppliers? What are guests and volunteers saying about the event? Each event is a learning experience – what did you learn to build on for next time?

As a boutique event management firm, Our Forté partners with charities, non-profits and philanthropic corporations to create and execute fundraising events and programs. Working with Our Forté Events allows our clients to maximize funds raised for their cause, save time and be more strategic in their fundraising solutions and approaches; stepping outside of the box and enjoying the work they do and the value they bring to the communities they support.

For more information on how you can collaborate with Our Forté Events on your fundraising, sponsorship or event programs please visit [www.ourforte.ca](http://www.ourforte.ca) or email [Ashlee@ourforte.ca](mailto:Ashlee@ourforte.ca)