**Event Planning Guidelines**

For most campaigns and organizations, fundraising plans will incorporate events. Events are a great way to bring in initial funds, identify supporters, network and test lists.

The message, or “hook,” needs to be determined when getting started. Are you inviting people to a conversation with a prominent elected official or a chili-cook off? Either can be immensely successful, but you must develop the message surrounding the event ahead of time.

Events can be a huge time suck and expense if not planned and implemented properly. It is important to have a strategy and set a realistic goal at the outset. The steps in securing an event and the timeline to execute it should be almost the same no matter the size and the scope of the event.

**EVENT TIMELINE: Planning, implementation and Follow-up**

**3 – 4 Months Prior to the Event: Meet and Set Goals**

1. Determine what the event will be (time of day, type of event, event message)
2. Determine how much you want to raise
3. How much you want to charge (for example: Sponsorships for $1,000 and individual tickets $150 each)
4. Determine in what city the event should be held and narrow venue options
5. Consider if there are venues that can be donated or where your organization may be able to get a reduced rate
6. Consider event dates (for example: if May is your target month, determine what other events are happening and what is the best timing)
7. Consider a celebrity, political star draw or “Special Guest” for the event and reach out to their people with dates and times
8. List project – is the list ready for a major email blast and/or invitation mail blast
9. Sponsor list or host committee must be completed ASAP
10. Ask elected officials or “prominent friends” if they could place sponsor calls

**6 – 8 Weeks Prior to the Event**

1. Date and venue must be solidified
2. Event draw must be solidified
3. Catering must be solidified
4. Invite must begin being designed, proofed and sent to printer
5. Sponsors should begin being contacted for support by all callers
6. “Save the Date” email to sponsors should go out
7. Make sure the event tracking is current

**3 – 4 Weeks Prior to the Event**

1. All invitations should be sent out
2. Follow-up calls to sponsors should continue
3. Follow-up calls to remaining list should begin
4. Menu should be finalized with caterer
5. Finalize logistical arrangements, such as “Special Guest” pick-up, timing of appearance and specific remarks
6. Make sure all deposits are paid to venue, caterer and other vendors

**Week of the Event**

1. Continue making calls to invitee list – keep raising money!
2. Print name tags for pre-registered guests
3. Make sure event tracking is current
4. Check-in with all vendors: caterer, music, etc., to ensure all are on track
5. Finalize speaking program
6. Make sure you have enough volunteers to assist with event check-in

**Day of the Event**

1. Finalize event tracking
2. Print name tags for pre-registered guests (name tags may not be necessary for some types of events – but this is a saving grace for hosts and candidates in many events)
3. Make a ‘sign-in’ sheet for walk-in guests
4. Arrive early at the venue
5. Make sure the caterer and any other vendors have everything they need
6. Meet volunteers prior to the event to help train them on what they will be doing: accepting contributions, making name tags, or just pitching in
7. Designate someone to be in charge of the “Special Guest” – have they arrived? Do they need a holding room? Do they need refreshments?
8. Designate someone to keep track of all elected officials who arrive
9. Continue to troubleshoot and monitor the event flow

**Post Event**

1. Reconcile list and follow-up with those who pledged but did not contribute
2. Update the database with the new information
3. Thank donors/sponsors/hosts