

How to plan a fundraising event



Whether this is your first event or one of many, understanding the key components and ensuring you have an event plan and lists to help you check off all of those last-minute details is critical to ensure success. In this guide we'll walk you through what event planning is, what it involves and how to write an event plan, step-by-step, with a checklist to help you along the way.

Key components of event planning

The key areas include:

Event preparation - writing an event plan, documenting budgets and timelines and researching venues, suppliers and helpers.

Event promotion - all of the aspects that help to promote the event, raise awareness and increase the number of attendees.

Event management - making sure the event goes without a hitch and that everyone is where they need to be.

Post-event review - data collection and analysis and reviewing these against the original event aims and figures. This will include a feedback form for you to fill out as well as an online de-brief meeting about your event.

Of course, there are many more individual tasks that fall under the event planning bracket, which is why creating an event plan to cover them all is a great idea.

How to make an event plan (and checklist)

To plan a successful event, it's important to have an event plan. This is usually completed before the event as it allows you to think about the event from start to finish. This is especially useful if you have different people/ teams you are working with.

1. An overview of your event - please fill in the boxes as you go through each section.

Name

Before you name your event, think through these questions: Is your event name unique? Memorable? Clear and descriptive so it's easy for people to know what your event is about?

Date

Have you checked to ensure there are no big direct or indirect competitive events on or close to your event date? Have you ensured there are no big bank holidays, religious holidays or other large events? Are you sure the venue is available and at least on hold for those dates?

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Venue

Before you make a decision, consider; have you checked to see if you've picked the best venue based on where your attendees come from? Are there good transport links to the venue? Does it fit with your budget, preferred dates and anything else important to the experience of your attendees? Have you considered what insurances and public liability you may need? Does the venue include first-aid equipment? Are first-aiders required to be at the event under the insurance?

Purpose

People run events for lots of reasons. What is the purpose of yours?

Need

Have you thought about identifying the core need of your attendees? Why are they going to pick your event over everything else they could spend their time or money on? What do you give them that no one else can?

Third-party endorsement/permissions

If using third-party branded images and/or material, do you have all the correct permissions in place? Third party copyright is when the rights to material belong to someone other than yourself such as images and long excerpts of text. If you are using material like this in your event, then you will need to seek permission from the person or company that owns the rights before using it.

Photo permissions

If you plan to take photos and/or videos of your event, you must make sure those attending have given permission to be on camera including attendees, staff and volunteers. If some do not give consent, any footage with them in must not be used in any way following the event. How do you plan to implement this?

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DBS checks

Will your event require DBS checks to be in place for those running it? For example, at any point, will children or vulnerable adults be unsupervised/unaccompanied by their parents? If yes, DBS checks may be necessary to ensure their safety and these checks must be enhanced.

2. Event audience and USP

What are the features or benefits of your event, which directly meet the needs of your attendees? For example: *We have an inspiring 5k walk, making it accessible for everyone, with all entry fees being dedicated to our cause.*

Unique Value Proposition

Can you pull the key elements of your event together into a simple, memorable tagline? This can boost the appeal of your event for the general public who it will be advertised to. For example: *Join hands with your community and show your support for VICTA in the unique grounds of Windsor Castle this Spring.*

3. Audience

Arguably your audience comes first, but as you start thinking about promotion, you should start to document exactly who you think should be at your event. Who is your main target audience?

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6. Event costings overview

This is the place to detail your headline costs or expected budget, so everyone is on the same page as to what they can and can't spend and where they'll need to make savings.

Get a proper handle on what you're spending and manage costs by using a budget template. Please note that not everything listed will be relevant.

Here's an example of what your event cost template may look like.

(Please fill out this template checklist to the best of your ability)

Expenses	Details	Cost
Venue		
Rental		
Insurance/licenses /first aid		
Furniture		
Other (can include:)		
Signage		
Refreshments (If applicable)		
Food (remember to consider access to a kitchen, equipment, varied dietary needs and hygiene standards).		
Beverages		

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Marketing (can be done in conjunction with VICTA)		
Printing (Posters, flyers etc).		
Website		
Promotional items		
Advertising		
Entertainment		
Speaker/Workshop provider fees		
Performers		
Volunteer expenses i.e. travel costs		
Other (please detail)		
TOTAL COST		

7. Team roles and responsibilities

Knowing who on your team will be responsible for what months in advance is vital as everything comes together in the planning stage. Have you considered volunteers and their respective roles on the day? What support will be there on the day?

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Event planning checklist

Use this checklist to ensure you have thought about all of the key areas relating to your event. Have you:

Action	Yes	No	Notes
Have you visited the venue?			
Created a venue risk-assessment?			
Created an event risk-assessment?			
Determined the event goals and objectives?			
Completed the event plan?			
Defined the event audience?			
Conducted local market research?			
Established a budget?			
Finalised the event budget?			
Decided on an event name?			

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Booked an event venue?			
Do you have all relevant third-party permissions in place including copyright permissions?			
If required, have you ensured staff, volunteers and you all have enhanced DBS certificates?			
Created a marketing plan and timeline?			
If you wish to capture footage of the event, have you presented the option for photo consent to those attending?			
Selected any possible vendors?			
Secured any event sponsorship?			
Determined a sign-up process?			
Launched marketing for the event?			

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Scheduled social media marketing?			
Booked speakers and presenters?			
Organised insurance and health and safety compliance (including security if needed)?			
Organised catering/ refreshments?			
Organised audio visual, lighting and staging?			
Booked entertainment?			
Organised event staff and/or volunteers?			
Do you have a system for capturing and tracking attendee numbers?			
Ordered event signage?			