

EVENT PLANNER CHECKLIST

Task	Group	Details
Sign venue contract	Pre-Event	
Set event date/s	Pre-Event	Start date & time dictate BetterUnite event reminders.
Decide on Name of Event	Pre-Event	
Designate Special Guests and honorees	Pre-Event	Many events have a special guest, entertainer, or honoree. Take time to ask and invite these event dignitaries far in advance of the event - making sure to get photos and bios where necessary.
Set pricing	Pre-Event	Based on your fundraising goals & ROI opportunities available, create sponsorship levels with advertising, value-adds and guest seats or tickets.
Choose an Event Location	Pre-Event	
Decide on the Event Fundraising Elements	Pre-Event	Live auction, silent auction, paddle raise, items for sale, raffle, giving levels, fundraiser teams or peer-to-peer, heads or tails, bid board, etc.
Select the Vendors for your event	Pre-Event	DJ, emcees, photobooth, talent, etc.
Consider the Creative Elements	Pre-Event	Games, guest activities, guest photo opportunities, etc.
Select the Logo, Colors & Design Elements	Pre-Event	All decor & graphic design pieces will be based off of these.
Source and Order Decor Items	Pre-Event	Tablecloths, centerpieces, other decor, etc.
Decide on the graphic design needs	Pre-Event	Invitations, programs, signage, bid paddles, menus, etc.
Decide the flow of your event.	Pre-Event	Where are the guests entering? Is registration clearly marked?
Create and print menu (if applicable)	Pre-Event	
Create Photographer Shot list	Pre-Event	Be sure that the photographer knows to take pictures of VIPs, signage, sponsored items, auction items, decor, displays, table decor, etc.
How many tables? Seats per table?	Pre-Event	The size of your event space, fundraising goals and usual event attendance will help you decide how many tables are needed and how many guests will be seated at them.
Hire a Caterer or Catering Company	Pre-Event	
Hire a Production Company	Pre-Event	A good production company can help with decisions around live stream platforms, video

		content, run of show, A/V needs and more. This is VERY important for the donors to have a good experience at the event.
Establish your A/V needs	Pre-Event	Live stream needs, recording, playback, wall graphics, microphones/sound, projection equipment, etc.
Decide on Lighting Needs	Pre-Event	Spotlights, ambient lighting, display lights such as vehicle uprights all need to be accounted for.
Choose the Stage placement, size and rent	Pre-Event	Most events will have a stage from which the presenters, auctioneer, MC and/or entertainers will speak and perform.
Rent a Podium if needed	Pre-Event	
Consider Valet and/or Parking needs	Pre-Event	Make access to your event as easy as possible so that guests and donors arrive happy & leave on a positive note.
Select SWAG or giveaways	Pre-Event	When guests are leaving, often they receive a gift from the organization or event sponsors.
Consider the Signage options for your event, event space and directional signs	Pre-Event	Will guests who have never been there, clearly know what to do and where to go?
Decide how many Registration Tables are necessary	Pre-Event	
Decide how many Silent/Live Auction Tables are necessary	Pre-Event	
Create a Volunteer Page for Event Volunteers	Pre-Event	Decide on the necessary Volunteers to support your event and create a volunteer sign-up page with jobs and shifts.
Select/Design a Main Event image	Event Setup, BetterUnite	Decide on the primary image for your event - this will be the default image for social shares and an option in Page Layout as a background image.
Write the Description of your Event	Event Setup, BetterUnite	Use your Content block to tell the story of your organization and the event. Describe the schedule of the event, what guests can expect, what they should wear, etc. The Content block is also a good place to highlight headlining sponsor(s), if necessary.
Create a single ticket (If you are selling tickets or tables beyond the Free Registration)	Event Setup, BetterUnite	When does this ticket go on sale? When do sales end? If your event is a hybrid event, create different tickets for virtual attendees and in-person attendees. IF you do not release all tickets at the same time, or if you launch your Auction separately and your Auction is open to anyone to bid in (not just attendees), make sure to communicate in following emails that those who have already registered do not need to buy or register for the virtual event or the Auction. BetterUnite will provide

		a message indicating an already created registration based upon the email provided and provide a path to the "Already Registered" function. Provide a description, FMV, and any other guest related information. How many are available? How many can be purchased at one time? Do you allow for installment payments? Will you accept pledged purchases? Add images to tickets if desired.
Create Sponsor Levels as Group Tickets	Event Setup, BetterUnite	How many seats are included (are they Table Sales)? What is the ROI each sponsor level receives? FMV How many are available? How many can be purchased at one time? Do you allow for installment payments? Will you accept pledged purchases? Add images to tickets if desired.
Create Table Sales (if different from Sponsorship Levels)	Event Setup, BetterUnite	How many seats are included? What does each table level receive if applicable? FMV? How many are available? How many can be purchased at one time? Do you allow for installment payments? Will you accept pledged purchases? Add images to tickets if desired.
Fill out or Delete Free registration ticket	Event Setup, BetterUnite	Decide on access to Live Stream and Silent Auction
Enter total tickets available in Total Tickets (If applicable)	Event Setup, BetterUnite	
Upload Sponsor logos	Event Setup, BetterUnite	Upload Sponsor logos that can be visible on your event page and optionally visible in a scroll across the Guest Experience page. Add a URL to the image, and when a guest clicks on the logo, they will be directed away from your BetterUnite page and directed to the company page.
Link your Social Accounts	Event Setup, BetterUnite	
Decide whether or not to utilize Progress Indicators	Event Setup, BetterUnite	If you make your fundraising progress visible on the event page, a progress bar thermometer will be visible. You can choose to make visible either the Gross or Net amount and whether you include items in your Guest Carts or only Completed Transactions. It is typically best to wait until you have some donations or ticket sales in your event to make your progress bar (or thermometer) visible.
Decide on and create Giving Levels	Event Setup, BetterUnite	Add Paddles Up or Fund-A-Need amounts here. When these are added into guest carts in the guest experience, guests will read Give. These will be visible on the event page as well as in the Guest Experience. Once you've added Giving Levels, you can add up to 10 images or 40 MB videos to each one. These will be visible on the event page as well as in the Guest Experience.

Decide on and create Items for Sale	Event Setup, BetterUnite	When these are added into guest carts in the guest experience, guests will read Buy. These will be visible on the event page as well as in the Guest Experience. Once you've added items, you can add up to 10 images or 40 MB videos to each one.
RAFFLE: Create Prizes	Event Setup, BetterUnite	Once Prizes are added, you can add up to 10 images and 40 MB videos
RAFFLE: Create tickets and groups of tickets	Event Setup, BetterUnite	Create a single raffle ticket, then create groups of raffle tickets from the single. If you're only selling groups of tickets, make the single ticket Hidden.
Review Guest Page Options	Event Setup, BetterUnite	Here you will choose what order you want your Guest Page participation icons to be in and which fundraising effort will be default when your guests open their Guest Experience page. Best to establish this before sending out the ticket link to curate the guest page experience. Test your event sign-up and click through the link to your own Guest Page and see how it looks on both a mobile device and a desktop. One of your fundraising modules may have more colorful imagery or be more compelling - this will likely dictate the choice of which module to make default.
Establish the Purchaser Checkout Requirements	Event Setup, BetterUnite	The person who purchases the tickets provides their information here - we will default the first Guest information fields with this information. But if the purchaser is not attending, it can be changed by the purchaser or the organizer.
Establish your Guest Requirements	Event Setup, BetterUnite	Information your event attendees (guests) will be required to provide or may optionally provide to your organization as they check-in or sign up for the event. If you need more information than the Default Suggested Fields, create a Custom Guest Field - this is a great place to ask for meal preference, dietary restrictions, etc.
Review Advanced Options	Event Setup, BetterUnite	Review the advanced options under the Advanced tab in Edit Event Page.
Create Discount tickets for key staff, board or others	Event Setup, BetterUnite	
Create access codes for Sponsor tickets	Event Setup, BetterUnite	If your event is entirely virtual, you can consider creating Sponsor or Group tickets that receive multiple registrations with purchase as Single Tickets. Then create a Hidden Sponsor Guest Ticket and create a unique Access Code for each sponsor to give to their guests.
Create access or bulk discount codes where needed	Event Setup, BetterUnite	

Review Communications: Content for Donors or Attendees	Event Setup, BetterUnite	
Select a Live Stream Tool to be used	Event Setup, BetterUnite	
Decision: if you will use the Live Stream Placeholder Content and what that will be	Event Setup, BetterUnite	Virtual or hybrid events can provide a placeholder image that tells the attendees that this is the place to go at the time of the event. In-person may set the event tone or communicate further information for guests utilizing the placeholder content.
Decision: Preauthorization on Checkout	Event Setup, BetterUnite	Decide if your event will have in-event fundraising opportunities that might need to be checked out after your event. If so, you can either ask guests to preauthorize their card before bidding or giving or send follow-up emails/texts asking guests to check out their own carts after the event. If you want guests to have a credit card on file before purchasing or bidding, you can hold the card they are buying their ticket or sponsorship with on file as a preauthorized card to use at the event.
Decision: Allow purchases without a card on file	Event Setup, BetterUnite	If you allow people to bid in the Auction, donate or purchase items without preauthorizing a card, you can make that choice here. Your guests will be able to click their name in the top left corner of their mobile guest page and scroll down to Check Out. You can also send payment instructions to each guest in their Guest Cart dropdown or do this as a bulk action in Guest Carts > ... > Send Payment Instructions to Guest
Decision: Guest Link Visibility	Event Setup, BetterUnite	When do you want BetterUnite to TEXT your guests with their Guest Experience Link? When ticket-buyers purchase a ticket, they receive their ticket (including the guest link) and receipt by email. The Guest Experience Link is sent to your guests via text at the time of the ticket purchase, at the time of check-in, or never. Consider what the Guest Experience page looks like when you open ticket sales: is your silent Auction active? Have you created and opened giving levels? Are your live Auction items available for view only? If not, your Guest Experience pages will have the ticket image and information in them. If you are hosting a virtual event or hybrid event, it is a good idea to create a Custom Placeholder that communicates to guests who click on this link that this is the page to come to at the time of the event.
Decision: Allow guest self checkout	Event Setup, BetterUnite	When guests click on their name in the top left corner of their Guest Page, they will see a list of all items purchased, donations made, and winning bids added to their Guest Cart. At the bottom of this list is a Checkout link. Guests can click through that link to checkout with either a preauthorized card or

		by entering a payment. You can turn off self-checkout by choosing this option. Decide on this before your event. As the self-checkout feature is not very prominent (intentionally), if you decide to ask guests to check out themselves, you will likely need to direct them to do so in post-event communication or a ticker and/or a text message.
Set up your Funding Fee Assignments	Event Setup, BetterUnite	Decide if the transaction and payment processing fees will point to the purchasers/donors or to your organization.
Decide if you're using Fundraiser Teams	Event Setup, BetterUnite	If so, toggle them on, create custom default content for child fundraisers and set up triggered email 2-3-Communications between the organizer and new fundraisers. Communication is everything with fundraiser teams! Make sure to walk through the process of creating a fundraiser team yourself so you can effectively communicate the vision and the function of the fundraiser teams for your event.
Create toolkit for Fundraiser Teams, if applicable	Event Setup, BetterUnite	A clearly articulated outreach plan for your fundraisers and fundraisers' team will help empower them and lead to more fundraising success. This can include special instructions, social media content, images, etc.
Create tables and assign guests to those tables	Event Setup, BetterUnite	
Number and Name Tables, but keep hidden from guests until finalized	Event Setup, BetterUnite	
Create teams if applicable and assign guests to those teams	Event Setup, BetterUnite	
Give BetterUnite Access to Check-in Staff/Volunteers	Event Setup, BetterUnite	
Give BetterUnite Access to Check-out and Quick Add Staff/Volunteers	Event Setup, BetterUnite	
Test Event Page	Event Setup, BetterUnite	Purchase a ticket yourself (you can refund the payment or add as an offline donation) and review the fee assignment, communications, etc.
Test Guest Experience Page	Event Setup, BetterUnite	Review the look and feel - you can purchase a ticket or go to Edit Event > Guest Experience > Preview as a Guest
Add Offline Ticket Purchases, Sponsorship Sales or Pledged Sales	Event Setup	Send your ticket or sponsorship purchaser the ticket and the acknowledgement (Default Email Note) by clicking Notify Contact. Manage Pledges from your Event in Guest Carts or in the Pledge Management module under Giving.

Decision: Assign or Bulk Assign paddle numbers	Event Setup	Decide in advance if you will pre-assign bid numbers or if you will assign guests their bidder number as they arrive at the event.
Consider using the Event Thermometer	Event Setup	Under Manage Event, find the Event Thermometer that can be filtered to highlight specific gifts or actions, show a donor scroll, show, or hide dollar amounts, and view real-time donation animations. The thermometer can be projected onto a wall or used in a livestream production.
Decide on Text-to-Donate Keyword or Short Code	Event Setup	Go to Settings > Text to Give
Create Videos for your event	Event Setup	Record/create promotional videos and event videos
Write Event Scripts	Event Setup	MC intros, Guest Speakers, Call to Action, Thank you, etc.
Create Power Point Presentations for event	Event Setup	Visuals, photographs, videos, and testimonials can be very impactful throughout the event.
Create and print event program	Event Setup	
Create paddles or bidder numbers	Event Setup	
Create Default Email Note	Communications	Add logos and signatures and use Merge Text Fields to personalize. NOTE that if you have assigned FMV to tickets or event offers, those will be visible and calculated with an itemized list of purchases and donations for your guest on this page. While you're considering Communication with your guests, also consider the branded emails, social campaigns, or posts and texts that you will send to your guests and potential guests in the lead-up to your event.
Create Event Purchase Acknowledgement	Communications	If this is left blank, the Default Email Acknowledgement will be sent. NOTE that if you have assigned FMV to tickets or event offers, those will be visible and calculated with an itemized list of purchases and donations for your guest on this page. Once your Event page is active, you should register for the event yourself and familiarize yourself with the registration/ticket purchase experience. Pay attention to the Guest Page look and feel to communicate what your guests should expect. Test, Test, Test!
Pre-checkout Commentary	Communications	Great place to remind guests of any needed fields (dietary restrictions, meal choices, etc.) or restrictions on access.
Post-checkout Commentary	Communications	Great place for a "See you Soon!" message. Type a note or any "Know-Before-You-Go" type of instructions.

Customize the Event Reminders	Communications	Will you use BetterUnite's automated (but customized by you) Event Reminder with the Guest Links directed to individual guests, or will you use your email marketing tool to send out branded reminders? If sending your own, follow instructions on Manage Event Dashboard > Guest Messaging > Event Reminders go out 3 days, 8 hours and 1 hour before the event.
Conditional Responses if applicable	Communications	Add rules that provide additional information upon checkout and in emailed Communications based on specific purchases (for example, if someone purchases the Platinum Sponsorship, then they receive the following language added to their Default Email Communication)
Establish Conditional Responses if needed for specific ticket purchases	Communications	Useful for Sponsorship Tickets or Table purchasers.
Create event tickers that will scroll across the bottom of the guest experience page	Communications	Consider tickers as a way to communicate specific reminders to guests during your event. Write out a schedule of expected tickers and the times they should be made active. Create all of your expected event tickers in advance and leave them hidden until it is time to use them. Tickers can also be used to highlight sponsors, volunteers, dignitaries, etc.
Schedule Suggested Texts	Communications	Texts that you can schedule to go out before the event happens. (Silent Auction opens, Reminder to Authorize card to expedite check-in, Event Reminder 3 hours prior to event)
Customize Ticket Purchaser SMS/Text	Communications	Decide on using Advanced Messaging - which allows you to customize the ticket purchaser text, schedule texts, filter and target texts, and DM specific guests. If possible, opt into Advanced Messaging from the outset, so customization is possible. Definitely a recommended practice! DM sponsors for a more personalized event experience. For HYBRID events, filter targets to send specific texts to virtual attendees and specific texts to those checked into the event. Schedule texts in advance of the event to reduce effort and potential confusion during the event.
Re-send guests their guest experience link	Communications	
Plan social strategy	Communications	Select event hashtag. Create event specific content. Decide on social post schedule.
Create and Send a Save The Date (electronic or paper or both)	Communications	Typically, 6-8 months out from event date
Create and Send an Invitation (electronic or paper or both)	Communications	Typically, 6-8 weeks out from event date

Event Reminders associated with event date	Communications	
Import Auction Items	Auction	Download the BU Import Auction template to use as you collect your Auction items to make import easy
Add Images to Auction items	Auction	
Add Winning Bidder information	Auction	This is the information that will be sent to the winner of the auction package.
Add Live Auction Items, make them View Only	Auction	
Review Auction Settings	Auction	Customize the Auction page image and/or provide a headline or message for guests to see on the public-facing Auction page.
Consider Auction Categories	Auction	Establish your Auction categories if you have more than 10-20 items to help your guests view the items easily.
Schedule individual items for viewing	Auction	You can highlight particular Auction items and obtain an individual item URL by going to the public Auction page, click on Auction item and click the square in the top right corner of the item to open the individual item as its own webpage. It may be helpful to highlight a specific item on social media.
Activate Auction	Auction	You can pause or End your Auction and undo that action if necessary. For example, if you want the Auction button to remain on your site after your Auction has ended, then end the Auction, award the items, then reactivate your Auction. No one will be able to bid unless you have un-awarded items.
Schedule End to Auction	Auction	You will still need to award the items - ending your Auction only stops bids from coming into the system. You can also End the Auction manually by clicking End Auction. Finally, you can undo End Auction by clicking the edit icon next to Completed.
Make Table Assignments visible to guests on their Guest Experience page	Day of Event	Table Management > Options > Table assignment visibility to guests > Show Table Name and/or Number (this will be visible to those at Check-in if you keep it hidden).
Check-in script	Day of Event	Write out a check-in table "script" that describes what you want the check-in table event representatives to say to guests as they arrive.
Check-in Training	Day of Event	
Assign Ticker writer	Day of Event	
Assign Random Drawing for Raffle person	Day of Event	

Print & Place Checkout Script at Registration Table	Day of Event	Have printed copies of your check-in script, wifi password and log-in information (if needed) at the registration table for volunteer/staff easy access
Checkout Training	Day of Event	
Print Scribe and Spotter sheets for Live Auction and Paddles Up	Day of Event	Spotter and scribe sheets should be printed and available with clipboards and pens for manual recording by multiple volunteers/staff of live auction winners and paddles up donors
Tell Guests their table and/or team assignment	Day of Event	Designate an event or organization representative who will decide what to do with any exceptions (people not registered, seated at the wrong table, etc.).
Award Live Auction Items with amount and bidder names	Day of Event	
Use Quick Add to add Paddles Up to Guest Carts	Day of Event	
Award or Bulk Award Auction Items to highest bidders	Post Event	If you need to award an item to someone who did not receive the highest bid, click the pencil icon in the bottom right corner of the item and View Bids. Then you'll have the option of choosing the winning bidder.
Add charges using Quick Add or on a per-cart basis	Post Event	
Remove charges that need to be removed	Post Event	
Bulk Checkout or Individually Checkout Guest Carts	Post Event	Bulk add charges. Before using Bulk Checkout, make sure to have awarded all Auction items and added any charges (in-person live Auction or paddles up, shipping, tax, etc).
Take Offline payments (check, cash, DAF, stock, etc.) and send acknowledgments	Post Event	
Resolve pledges	Post Event	
Send Payment instructions to guests without a card on file	Post Event	
Send Thank you notes to auction winners	Post Event	Auction winners, high level donors, vendors, volunteers, VIPs, speakers, talent, etc. (Tip: Some of these you can write beforehand and send immediately after with little effort.
Schedule time with your team for an event debrief	Post Event	Take notes on what worked well and what didn't to improve your event for next year!