

BETTER EVENTS WITH **b** betterunite

A BEST PRACTICES GUIDE FOR NONPROFITS



INTRODUCTION

Galas, Golf, and Gatherings—oh my!!

There are many reasons why your organization has decided to host an event. Whether it is for fundraising or friend-raising, they can be a great source of revenue and a great source of headaches without the proper management tools.

- Events can help you **raise money** through ticket sales, auctions, donations, and sponsorships.
- An event can help increase **awareness** about the nonprofit's mission, programs, and impact. Commonly called "friend-raisers", these events offer an opportunity to educate attendees about the cause and how they can get involved.
- Hosting an event helps build a sense of community among supporters, volunteers, and beneficiaries.
- Events can be a great way to **recruit and engage volunteers**. By showcasing the organization's work and impact, events can inspire attendees to get involved.
- Events can serve as a **celebration of your mission, milestones**, and achievements. They can also motivate staff, volunteers, and supporters by recognizing their hard work and dedication. However, these appreciation events are often overlooked as part of fundraising strategies. A donor appreciation event allows nonprofits to engage with current donors to show appreciation, share success stories, and highlight the impact of donations.

Creating a successful event involves a lot of work, and **planning is imperative. Small things, like neglecting to send email follow-ups or choosing the wrong software, can quickly turn an event from fabulous to flop.**

This guide is designed to help you **use the right tools in a structured approach to **reach your objectives**.**

THE PLANNING PROCESS (PRE-EVENT)

Start Planning 6-8 Months Before Your Event

Planning is the key to success, whether you're organizing your first fundraiser or an annual gala. Depending on the scope of your event and the size of your community, you may need up to a year to secure the right venue, recruit event leadership, and solidify your event goals.

Cutting this timeline too short can result in missed opportunities and an underwhelming event experience.

BetterUnite offers a comprehensive checklist to help keep you organized and on-track!

Event Setup ▾

☒ Unselect Group

- | | |
|--|--|
| <input checked="" type="checkbox"/> Add Offline Ticket Purchases, Sponsorship Sales or Pledged Sales | <input checked="" type="checkbox"/> Decision: Assign or Bulk Assign paddle numbers |
| <input checked="" type="checkbox"/> Consider using the Event Thermometer | <input checked="" type="checkbox"/> Decide on Text-to-Donate Keyword or Short Code |
| <input checked="" type="checkbox"/> Create Videos for your event | <input checked="" type="checkbox"/> Write Event Scripts |
| <input checked="" type="checkbox"/> Create Power Point Presentations for event | <input checked="" type="checkbox"/> Create and print event program |
| <input checked="" type="checkbox"/> Create paddles or bidder numbers | |

Step 1: Understand the “Why” Behind the Event

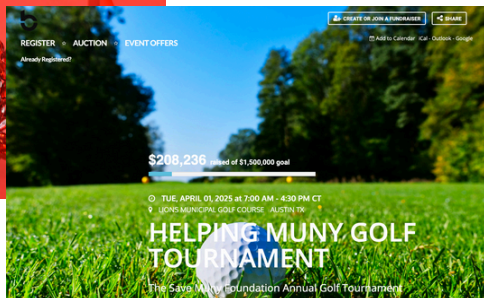
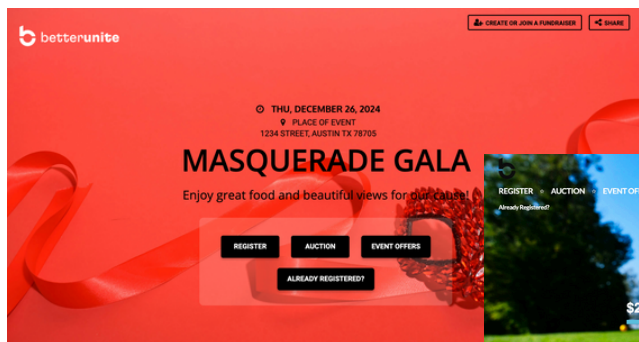
Before committing to any event details, could you sit down with your team and ask: What type of event are we planning, and why?

It’s easy for board members and other stakeholders to throw out big ideas like a golf tournament or a crowdfunding campaign. While well-meaning, they often underestimate the work involved.

Take the time to answer fundamental questions:

- What are the primary goals?
- Who is the target audience?
- How does this event align with your mission?

Clearly defining your purpose ensures your event is focused and intentional. For example, a fundraising event might require 8 months of planning, while a more casual “friend-raiser” might need only 4 months.



Step 2: Set Clear, Measurable Goals

Don't just focus on financial goals. Broaden your scope by setting objectives such as:

- Build deeper connections with 10 existing donors
- Secure 5 new media mentions
- Recruit 5 new corporate volunteer groups

Having non-financial objectives ensures that every committee member knows what they're working toward, making the event feel more like a collective mission.

Tools like BetterUnite can help align your event planning with these objectives. We provide features to manage everything from RSVPs and Volunteer Management to detailed Donor Management.

Step 3: Assemble a Leadership Committee

Volunteer leadership is vital! While your staff will play a key role, recruiting a passionate, dedicated volunteer event chairperson is essential. This person can help form a dynamic team that includes:

- Logistics Coordinators
- Sponsorship & Auction Leads
- Marketing/Communications Leads
- Volunteer Coordinators

Staff should provide detailed role descriptions to clearly define each person's responsibilities and deadlines.

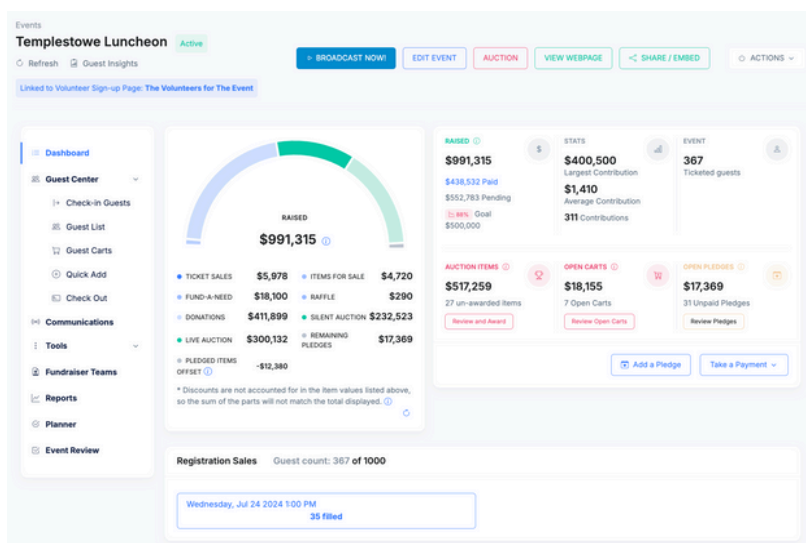
Step 4: Establish a Budget

A detailed, realistic budget is your event's financial blueprint. Consider all potential expenses like:

- Venue
- Food & Beverage
- Entertainment
- Marketing & Printing
- Audio & Visual
- Credit Card Processing Fees
- Unexpected Contingencies

If you're unsure, we have solutions to help you plan and stick to your budget.

If this is the first time you're hosting this event, it is imperative that you set objectives, including the fundraising goal, in advance and then work backwards into the budget. If this is an annual fete, you will want to adjust your budget according to the new annual goals.



Step 5: Carefully Pick a Date and Venue

The correct date can make or break your event. Here's how to approach the decision:

- Avoid conflicts with major holidays or established community events
- Test the date with key donors and staff to gauge their availability
- Consider the weather—especially for outdoor events

Once your date is locked, find a venue that aligns with your mission if you haven't done so already. While choosing a "prestigious" venue is tempting, it's more important that the space meets your event's logistical needs. For example, ensure proper acoustics, adequate space for guest registration, and comfort for your attendees.

Pro Tip: If hosting a cocktail hour, please ensure one bar for every 50 guests to avoid long waits. You can expect each guest to have two drinks in the first hour.







Step 6: Plan for Ticket Sales and Fundraising

When the basic event details are confirmed, begin your ticket sales campaign. Make sure to create tiered ticket levels for different donor groups, such as:

- General Admission
- VIP Tables
- Table Sponsors

Start by covering your costs and adjusting as you go for new events. Use past ticket sales data to help guide your pricing strategy for established annual events.

Event Registration					Help	Bulk Update	Add	
<input type="checkbox"/>	ITEM	TYPE	PRICE	QUANTITY				
<input type="checkbox"/>	 Individual Individual ticket, plated dinner	Single	\$250	47 claimed	Edit			
<input type="checkbox"/>	 Couples Two tickets, plated dinner	Group of 2 x Individual tickets	\$450	3 claimed	Edit			
<input type="checkbox"/>	 Deluxe Table Table of ten tickets, plated dinner	Group of 10 x Individual tickets	\$2,000	2 claimed	Edit			
<input type="checkbox"/>	 VIP Table Table of ten tickets, plated dinner, special ta ⓘ	Group of 10 x Individual tickets	\$3,500	2 claimed	Edit			
4 items				54 claimed				

Step 7: BetterUnite Event Services

BetterUnite Event Services are designed to help organizations plan and execute successful events by providing live, in-person support, such as managing registration or online auctions.

Here's an overview of the services provided:

- Event Setup & Configuration
- Event Tech Support
- Event In-Person Onsite Services
- Guest Import Assistance
- Check-In Registration Training





MARKETING AND PROMOTIONS

Effective marketing is the bridge between a well-planned event and its successful execution. Whether you're aiming to raise funds, increase awareness, or build community, a strong marketing strategy is essential to achieving your goals.

In this chapter, we'll explore the key components of a comprehensive marketing plan—from developing a compelling theme and crafting your sponsorship package to leveraging social media and local press.

The right marketing approach not only amplifies your event's visibility but also fosters deeper connections with your audience, ensuring that your nonprofit stands out and engages supporters at every step.

Step 1: Theme and Branding

Every successful event starts with a strong, clear theme. While legacy events might have an established theme, you can still give it a fresh look each year. Don't overcomplicate this step—focus on your mission. Canva offers free design templates to help you create a branded visual identity for your event.

Step 2: Create a Marketing & Communication Plan

Your marketing strategy should be multifaceted:

- Social media campaigns
- Email marketing
- Press releases
- Local flyers
- SMS text messages

Consider building relationships with local media outlets—print, television, radio, and online—to amplify your reach. A media list is invaluable! Share exciting milestones like new sponsors or donations, and use those announcements to keep momentum high.

Promotion/Marketing	10/1/2024	3/1/2025
Send save the date to past attendees - DIRECT MAIL	10/1/2024	10/1/2024
Put up on website	10/1/2024	10/2/2024
Promote on social media - event details	10/5/2024	10/5/2024
Save the date email blast	10/7/2024	10/7/2024
Press release to local media #1	10/10/2024	10/15/2024
Resend email to opens and clicks	10/15/2024	10/16/2024
Promote on social media - sponsor announcement	11/1/2024	11/7/2024
Promote in end of year giving for table sponsors	11/15/2024	12/1/2024
Promote in social media - auction items	1/5/2025	1/10/2025
Press release to local media #2	2/15/2025	2/15/2025
Follow up calls to media	2/15/2025	3/1/2025

Step 3: Develop a Sponsorship Package

Potential sponsors care less about logo placement and more about the impact of your event. When creating a sponsorship proposal, highlight the value of their involvement:

- "Our event will bring together the city's top business leaders."
- "Our event reaches 500+ local philanthropists."
- "Media exposure will reach over 350,000 households."

Use real numbers, audience insights, and emotional appeals to demonstrate how their brand aligns with your cause. Follow through with personal calls connecting directly to your mission and why it should matter to them.

Step 4: Secure Auction Items

Your silent auction can make up 20-30% of your total revenue, so gathering appealing items is essential. Services like CharityAce can help connect you with potential donors. However, be cautious with consignment items, as they may not always represent a complete donation.

Aim to gather as many items as possible early in the process, even if they aren't perfect. You can always group them into themed baskets.


Step 5: Volunteer Management

Volunteers are crucial for event success. Ensure you have clear roles and responsibilities laid out for each volunteer, from guest check-in to auction management. BetterUnite allows you to manage volunteer sign-ups through the same platform where you manage event details, giving you a seamless way to track volunteer engagement.

Example volunteer jobs include:

- Setup Crew
- Silent Auction Packaging
- Silent Auction Setup Crew
- Guest Check-in/Checkout
- Greeters/Ushers
- Silent Auction Spotters/Scribes
- Live Auction Spotters/Scribes
- Silent Auction Package Delivery (if applicable)
- Cleanup Crew

Annual Luncheon Volunteers
betterunite



VOLUNTEER TIME

Wed, December 17, 2025

LOCATION

123 Main St
Austin, TX 78746

Event

Masquerade Gala

JOIN US

DONATE

Opportunities

CHECK-IN

Wednesday, Dec 17 2025 10:00 AM

SET-UP

CLEAN UP

Help Us Make Our Luncheon a Success!

We are beyond excited to host our upcoming luncheon event, and we need ****your**** help to make it extraordinary! Whether you have a talent for making people feel welcome or enjoy serving up drinks and keeping things tidy, there's a perfect role for you. We are seeking ****check-in volunteers****, ****bartender volunteers****, and ****clean-up volunteers**** who are eager to support a fantastic cause and make our event shine.

Step 6: Keep Costs in Check

Decoration is a fun part of event planning, but it can quickly spiral out of control. Remember that every dollar spent on décor is a dollar that can't be used for fundraising. Focus on functional décor that highlights your mission, such as fund-a-need pop-up tents featuring QR codes that direct attendees to your donation page.

Additional tips:

- Take advantage of BetterUnite's Auction Showcase View to showcase your auction items and save on expenses.
- Include QR codes for simple donations at every table and/or in your program.
 - If your event includes a printed program, place your most important information in the centerfold to ensure it stands out. Keep the pages concise but impactful by including:
 - Welcome message from your CEO, Committee, or Board Chair
 - Impact Statement
 - Live Auction Preview
 - Donation QR code to Giving Level Page

Finally, don't apologize for putting fundraising above aesthetics!

THE EVENT

ONE MONTH OUT

Please review your event logistics and confirm that all contracts have been signed and payments have been made.

- Are auction items uploaded, bundled and organized?
- Have you finalized ticket sales?
- Is your auction landing page set up for easy bidding with key items to the top?

This is also the time for a final push to sell tickets and sponsorships. In many areas, 40% of ticket sales happen in the final 2 weeks, so don't hesitate to engage past donors or VIPs with personal calls or offers of special pricing.

The screenshot displays the BetterUnits.com auction management dashboard. The main table lists the following items:

ITEM	#	STATUS	DETAILS	BID STATUS	ACTIONS
Beauty Gift Set	1	Active	Est Val \$200 Min Bid \$100	\$800 Total Bids: 23 Highest Bidder: Major oswald	[Edit] [Award Item]
Live Auction	100	Awaiting	Live Auction	\$163 Total Bids: 4 Highest Bidder: Major Oswald	[Edit]
Vase Set Part of a Bundle	101	Awaiting	Est Val \$350 Min Bid \$40 Buy \$500	\$500 Total Bids: 3 Highest Bidder: Rita Wilson	[Edit]
Auction Item 20 Part of a Bundle	102	Purchased		\$10 Total Bids: 14 Highest Bidder: Major Oswald	[Edit]

WEEK OF THE EVENT

Step 1: Final Check-In Preparation

Guest check-in should be seamless and efficient. Don't forget to personalize your campaign's Email communications with BetterUnite to streamline the process and enhance the guest experience:

- Resend Guest Info Request—This message is only sent if one or more guests in the purchaser's tickets are missing details. It is intended as a tool for you and the guests to improve the check-in process and ensure the completeness of guest information.
- Explain the process clearly: "You'll only be charged if you win an auction item or make a donation."
- BetterUnite's software makes it simple to pre-authorize credit cards, ensuring a smooth check-in process.

Step 2: Dry Run with Volunteers

Before the event, conduct a dry run of your check-in and check-out process with your volunteers. A Zoom session works well for remote volunteers, and recording the session ensures everyone stays aligned. BetterUnite also provides event services, including Check-In Registration Training, to help your team prepare thoroughly.

Step 3: Day-of Setup

Ensure your venue matches your contract and that the décor is functional and visually appealing. Arrive early to review the venue setup:

- Test sound systems
- Review table and linen layout
- Add table décor such as Fund-a-Need table tents
- Finalize auction area setup

Step 4: Smooth Guest Check-In and Auction Checkout

To provide a seamless guest experience, ensure that check-in is quick and well-organized. Keep lines moving by having an adequate number of volunteers—aim for 1.5 volunteers for every 100 guests as a guideline.

Step 5: Handle the Auction with Care

Your live and silent auctions bring excitement and make your event truly memorable. Be sure to include Winning Bidder Communications to promptly notify each winner.

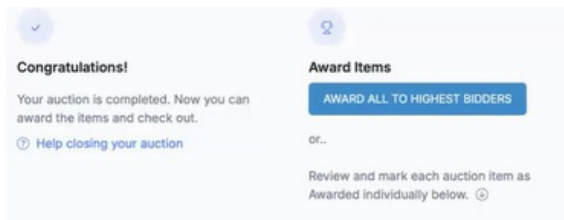
Tip: BetterUnite enables real-time bid recording, ensuring a seamless experience for both your team and attendees

Understanding how your software solution handles this process is imperative.

BetterUnite offers an easy process for awarding winning bids, whether it's for live auctions or online bidding, ensuring a smooth and efficient experience.

Schedule your auction end time within the system and activate the countdown clock. This will show all bidders the amount of time they have left to bid.

Once it is closed, you simply award to the highest bidder and their items will be in their carts for payment at the check out station. If they have a credit card on file, it can be used for this purchase.



Grab your bid spotter forms immediately after the live auction and start entering the data promptly to ensure live auction winners are awarded accurately. For even greater efficiency, consider entering the data live while in the room.

You can also choose to close your silent auction 24-48 hours after your live event to help everyone concentrate on what is happening in the room day of. This can give your bidders the opportunity to bid more on their silent auction items if they don't win any live auction items.

USING BID SHEETS

Some organizations or committees use bid sheets to spark excitement and engage donors. While this approach may feel a bit old-school, BetterUnite has digitized the process for modern events. However, if you prefer, you can still easily print bid sheets from the Auction module in your BetterUnite account.

If printouts are preferred, we suggest that you put your bid sheet in numerical order and have a spotter work with your auction lead to input the information into the system as quickly as possible.

Using BetterUnite, you can quickly enter the item and winning bid amount into the donor's cart for easy checkout. If Basic Messaging is enabled, winners can receive automated text or email notifications.

WHATEVER PROCESS YOU USE, BE PROFESSIONAL AND ASK FOR PATIENCE.

TAKE YOUR TIME AND DO IT RIGHT.

Last-minute flaws in your auction process can derail an otherwise successful event. Ensure a smooth experience by watching BetterUnite's Checkout Training videos and staff checkout with enough volunteers to input data and process payments efficiently.

Inevitably, some things won't sell. Have your spotters pay attention and lower bids if it makes sense.

POST-EVENT

Step 1: Evaluate and Reflect

Gather your team for a debriefing within a week of the event. What worked well? What could have been done better? Collect feedback from attendees, staff, and volunteers to refine future events.

Step 2: Show Appreciation

BetterUnite simplifies sending thank-you emails with its Automated Post-Event email feature, making it effortless to thank attendees and sponsors while strengthening relationships and laying the foundation for future support.

Step 3: Financial and Impact Review

Review your financial outcomes and compare them to your original goals.

- Did you meet or exceed your fundraising targets?
- How did the event align with your mission / values?
- Identify target audiences who did not participate and assess the entry barrier. Consider adding a lower-level option to encourage broader engagement.

Document the entire process, noting key successes, challenges, and lessons learned. Sharing your results and impact with stakeholders and media helps strengthen your organization's visibility and reputation.

**LET US HELP YOU
CREATE AN EVENT
THAT YOU AND YOUR
DONORS WILL
REMEMBER!**



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