The complete fundraiser planning checklist

Every task from first goal to final thank-you, on one page.
Print it, check the boxes, and never lose track of a deadline.

1 3 TO 5 MONTHS OUT — Foundation

- [ ] Write one SMART goal with a dollar target and date
- [ ] Draft the budget: every cost and income line
- [ ] Add 10% contingency and account for platform or processing fees
- [ ] Choose the event type that fits your audience and goal
- [ ] Name one owner for each core role
- [ ] Lock the venue, confirm permits, and check insurance
- [ ] Send save-the-dates to key guests

2 2 TO 3 MONTHS OUT — Build

- [ ] Open ticket sales and registration
- [ ] Build three sponsorship tiers with clear prices
- [ ] Send sponsor asks, lead with audience overlap
- [ ] Line up catering, entertainment, and vendors
- [ ] Confirm in-kind donations (venue, auction items, printing)
- [ ] Set up your tech stack: ticketing, payments, CRM, receipts

3 6 TO 8 WEEKS OUT — Promote

- [ ] Send formal invitations
- [ ] Launch email, SMS, and social promotion
- [ ] Build a content calendar, one message per channel per week
- [ ] Recruit and assign volunteers

4 EVENT WEEK — Rehearse

- [ ] Test the full donation and payment flow end-to-end
- [ ] Print the run-of-show for every lead and check-in
- [ ] Confirm final headcount and table assignments
- [ ] Brief volunteers on roles and cues

5 EVENT DAY — Execute

- [ ] Fast, warm check-in with visible giving options
- [ ] Run one clear giving moment with a live donation display
- [ ] Announce the running total and a final easy way to give

6 WITHIN 48 HOURS — Follow up

- [ ] Send personal thank-yous to attendees, donors, and volunteers
- [ ] Send tax-ready receipts to every donor
- [ ] Share results: total raised, photos, impact line
- [ ] Invite the next gift: monthly, next year, or follow