



FREE POST-EVENT WORKBOOK

Post-Event Fundraising Checklist

Wrap up your fundraiser the right way with a step-by-step checklist for everything that happens after the event. Collect outstanding funds, thank your supporters, review your results, and turn what you learned into a stronger plan for next year.

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How to Use This Workbook

The event is over, the room has emptied, and the number on the screen is not yet the number in your account. What you do in the next few days decides how much of it you actually collect, and how many of those people come back next year.

Work through it in order: the first 24 hours, the first week, the first month. Fill in the worksheets as you go, and you will finish with next year's plan already half written. Anything in [square brackets] is for you to complete.

You'll Find

- 1 **The whole checklist at a glance, with owners**
 - 2 **What to do in the first 24 hours**
 - 3 **The reports to pull, and what each one is for**
 - 4 **A prize fulfilment tracker**
 - 5 **A reconciliation worksheet**
 - 6 **A data review that feeds next year's plan**
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Why the First Few Days Matter

- ✓ **Unpaid invoices get harder every hour.** Guests are back in their normal lives, and a payment that felt like a given in the room quietly gets pushed aside.
- ✓ **Late prizes are remembered.** Delayed fulfilment is one of the most common post-event complaints, and it affects whether a winner returns.
- ✓ **Gratitude has a short half-life.** A thank you at 48 hours reads as genuine. The same words a fortnight later read as admin.
- ✓ **Sponsors are judging the follow-through.** They assess their investment partly on return and partly on how the whole experience felt.
- ✓ **Your lessons fade fast.** The debrief you write this week is worth more than the one you write next month.
- ✓ **Next year is decided now.** Venues fill up, and sponsors are most receptive while your event is still visible to them.

THE OVERVIEW

The Whole Checklist

Print this page, put a name against every row, and work down it.

Task	When	Owner	Done
Chase outstanding payments	Within 24 hours	[]	[]
Confirm raffle winners have been notified	Within 24 hours	[]	[]
Confirm auction winners are recorded correctly	Within 24 hours	[]	[]
Process any refunds	Within 24 hours	[]	[]
Send thank-you communications	48 to 72 hours	[]	[]
Download and archive your full reports	First week	[]	[]
Dispatch prizes and fulfil items	First week	[]	[]
Acknowledge sponsors publicly	First week	[]	[]
Reconcile the financials fully	First month	[]	[]
Debrief the team	First month	[]	[]
Review the data for next year	First month	[]	[]
Report the total back to supporters	First month	[]	[]
Lock in next year's date, open sponsor conversations	Now	[]	[]

Money First

Chasing outstanding payments is the single most time-sensitive task on the list. Do it the morning after the event, not at the end of the week. Response rates drop the longer you wait.

- ☐ Every participant with an outstanding balance identified
- ☐ Reminders sent, with a direct link to their invoice
- ☐ A second follow-up scheduled for 48 hours later if there is no response
- ☐ Every raffle prize confirmed as having a named winner, and the notification confirmed as landed
- ☐ Any winner who has not responded flagged for a 48-hour follow-up
- ☐ Auction winners cross-checked against live-auction bids entered manually on the night
- ☐ Any items settled outside the platform documented consistently with everything else
- ☐ Refunds processed for duplicate bids, incorrect charges or unavailable items

Where errors creep in: *live-auction bids entered by hand on the night. Cross-check every one against your records before you chase anybody for money. A guest who has to correct you about what they owe remembers it, and so does a guest who has to follow up twice about a refund.*

Pull and Archive Your Reports

Before anything else, take a complete offline record of the event. Download these as Excel files and store them in your own records, even if your platform keeps the data. Your own copy is what matters for auditing and for comparing year on year.

Report	What is in it	What you use it for
Invoices	Every participant's contact details, items won or purchased, amounts paid and outstanding	Chasing what you are still owed
Payments	All transactions, including taxes, processing fees, refunds and net profit	Your financial source of truth
Summary	A breakdown by activity: auction, raffle, donations, buy-now purchases	Reconciliation, and next year's forecast
Bids and Buys	Every bid, donation and raffle ticket purchase, with timestamps	Spotting your most engaged supporters
Raffle Tickets and Winners	Ticket numbers sold against tickets drawn	Confirming every prize has a named winner
Participants	Full registration details	Your supporter records for next time

Archive these before you close out the campaign. It is far easier than reconstructing them later.

Dispatch Prizes and Fulfil Items

The clock on fulfilment starts the moment the event ends. Contact every winner within five to seven days. Anything that needs booking, a travel package, a restaurant experience, a ticketed event, needs clear instructions and a named contact point.

Winner	Item	Needs booking?	Contacted	Dispatched
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]
[]	[]	[]	[]	[]

Set a reminder to follow up with anyone who has not booked within a reasonable window. Bookable items are the ones most likely to stall, so prioritise a phone call or a personal email over another automated nudge.

48 TO 72 HOURS

Send Your Thank You

This is not a courtesy. It is one of the highest-leverage things you will do for next year's fundraising, and the window is 48 to 72 hours.

Every Attendee Gets

- ☐ A genuine expression of gratitude
- ☐ The total raised
- ☐ A concrete note on what that figure achieves
- ☐ Recognition of sponsors, major donors and volunteers

Keep it specific rather than generic. A note that tells a supporter exactly what their contribution makes possible lands very differently from a form letter.

These People Get a Personal Note

Who	Why	From whom
Your highest-value donors	Most likely to return, and to bring others with them	A senior person in your organisation
Table sponsors	They judge the investment on follow-through as much as on return	A senior person, or their named contact
Big-spending auction winners	The night cost them real money. Acknowledge it properly	Whoever they dealt with on the night
Prize and item donors	Tell them how their item was received, and what it raised	Whoever secured the donation
Volunteers	A team that feels appreciated turns up again	Their coordinator, separately and specifically

Acknowledge Your Sponsors Publicly

Follow through on exactly what you committed to at the planning stage:

- ☐ The social media mention you promised
- ☐ Their logo in the thank-you email
- ☐ The feature on your campaign page
- ☐ A personal note to the sponsor's key contact

Reconcile the Financials

Once outstanding payments are collected, refunds processed and payouts cleared to your account, complete a full reconciliation and compare it against what you projected.

Gross revenue by activity

Silent auction: []

Live auction: []

Raffle: []

Paddle raise: []

Donations: []

Ticket and table sales: []

Less processing fees: []

Less platform and consignment costs: []

Net funds raised: []

Against projection: []

Where did you beat expectations, and where did you fall short? Those two answers are the most useful input you have for next year.

Debrief and Review the Data

Bring your core team together while memories are fresh, and write it down as a narrative account of the night, not just a list of action items. Next year's planning team will include people who were not there.

- ✓ **What worked?** Name the specific moments rather than general impressions.
- ✓ **What created friction?** For guests, for volunteers and for your team.
- ✓ **Any technology issues?** And how were they resolved on the night?
- ✓ **What did volunteers say?** They saw the guest experience closer than anyone.
- ✓ **What patterns are worth digging into?** Anything that came up more than once.

Review the Data With a Planning Lens

Not just for reconciliation. This is what separates organisations that plateau from ones that grow year on year.

The question	This year	Last year	What we will change
Which items generated the most bids?	[]	[]	[]
Which items jumped furthest above their starting price?	[]	[]	[]
Which items got little or no bidding, and why?	[]	[]	[]
Raffle sales: pre-event versus on the night	[]	[]	[]
Average donation per guest across all activities	[]	[]	[]
First-timers versus returning supporters	[]	[]	[]

A high pre-event share of raffle sales means open sales earlier next time, and promote them harder. A low one means your on-the-night selling is doing the work.

Report Back, Then Start Next Year

Once you have a clear, verified total, share it: a social post, an email to your full list, a campaign page update, and a note to local media where it fits. The message that matters is not the number on its own, it is what the number means.

- ☐ Total reported publicly, with what it funds and who it supports
- ☐ Next year's date locked in, before venues fill up
- ☐ Early sponsor conversations opened while your event is still visible to them
- ☐ Prize leads and ideas from the debrief captured while they are front of mind

Quick Answers

Question	Short answer
How soon should thank-you emails go out?	Within 48 to 72 hours. Longer than that and it stops feeling personal or timely, and it delays the moment supporters learn what they achieved.
How long do we have to collect unpaid invoices?	There is no hard deadline, but response rates drop the longer you wait. Send reminders the morning after, and follow up again within 48 hours.
What belongs in a post-event report to donors?	The total raised, a concrete statement of what it will fund, and recognition of major donors, sponsors and volunteers by name where appropriate.
How do we chase winners who do not respond?	Set a follow-up trigger for 48 hours after the first notification, and prioritise a phone call or personal email for anything needing booking or handover.
Should we tell donors if we fell short of the goal?	Yes. Reporting the honest number, alongside what it will still fund, serves the relationship better than downplaying a shortfall.

PRO TIPS

Tips That Protect the Total

- ✓ **Chase the morning after.** Not the end of the week. Every hour costs you response rate.
- ✓ **Contact every winner within a week.** Bookable prizes are the ones that stall.
- ✓ **Keep your own copy of every report.** Even when the platform retains the data.
- ✓ **Write the debrief as a story.** Next year's team was not in the room.
- ✓ **Report the honest number.** Even when you fell short. Trust outlasts one result.
- ✓ **Lock next year's date now.** Venues fill up, and sponsors are warmest this week.

Collect More of What You Raised

The gap between what a room pledges and what reaches your account is mostly a chasing problem. GalaBid closes it, and keeps the whole event in one place:

- ✓ Every participant's payment status at a glance, with reminders sent in bulk
- ✓ Raffle winners notified automatically by email or SMS the moment the draw is made
- ✓ Silent auction, live auction, raffle, ticketing and donations together in one campaign
- ✓ No app download needed for your guests
- ✓ Funds go straight to your own account. GalaBid never touches them

GET STARTED →

SEE PRICING FOR YOUR REGION →