

Planning a Fundraising Event: General Points To Consider

From a bake sale to a ball, the key to a successful fundraising event is meticulous planning and execution, whether a small local event or a large-scale event. Below are some of the key points to take into consideration to ensure success.

Please note that in any event, the most important thing is the Event Plan. This is your guide to ensure the event runs smoothly, that you have considered all legalities, the health and safety of all concerned, the logistics, the finances and only then can you execute a successful fundraiser. It may be one page long or a 50-page document, depending on the scale of the event, but it must always include the event timings, details for any staff/volunteers including emergency contacts, contact information for key organisers, contractors, third parties and authorities should also be listed, a clear and detailed breakdown of the event with timings. Copies of any licences, contracts, receipts or invoices and an Emergency Response Plan (ERP) if required.

You can find a template event plan and risk assessment [in this assets section](#).

Key Steps to Consider when planning your event.

What

- What is the activity/event?
- Who is responsible for the event i.e. Who is organising it, paying for the venue/food/event?
- What is going to be happening, and the type of activities involved?
- Will there be other companies/service providers involved? E.g. DJ, children's entertainer, food caterer
- Will the activity be part of someone else's event? If so, who and what, e.g. stall at a fair or performance at an event?

Where

- Where will the activity take place?
- If outdoors, what about toilet facilities?
- If in a building, where in the building? e.g. upstairs, downstairs (evacuation and access requirements)
- Is there adequate parking (if required)?
- Does the venue have all the relevant licences, risk assessments, and health and safety documentation?
- If in public, do you have the relevant permission, e.g. landowner or council licence?

When

- Will it clash with other activities and events taking place, either locally or nationally?
- Times/duration?
- Month/Season? (weather considerations)
- Day or night? (lighting considerations)
- Timings of event, when does the venue have to close for their licence agreement? If taking place in a park, what time does it close?

Who

- Who is the lead person and ultimately responsible? If under 18, please ensure you have an appropriate adult to work with.
- Who will create the Event Plan, create risk assessments and be responsible for the plan on the day?
- Who else will be involved in arranging the activity? Is there a committee or group?
- Will there be volunteers, staff etc? Is there a plan in place for them?
- Who is guaranteeing minimum attendance levels e.g. If a ball, who has the contacts to fill tables, etc.?
- How many people are expected?
- Will children be attending?
- Will animals and pets be present at the activity? If so, what type?
- Is the activity suitable for vulnerable people, such as those with disabilities?
- Who will be presenting/MCing the event if necessary?
- Who will speak about the charity and the importance of donations?

How

- How will you promote the activity?
- Will you need posters/tickets/flyers? If yes, how many and when will you need them by?
- How will you sell tickets or collect donations? An online platform, such as Eventbrite or traditional physical tickets.
- Do you need a float/change for the activity? Do you need access to card readers or the ACCT UK Sum Up app?
- Do you require any additional materials, balloons, table cloths, bunting, flowers, table names, seating plan, goody bags etc?
- Will the attendees want to donate gift aid? Do you have a plan to get the necessary permissions from them (forms and envelopes, tick box available at online registration?)
- How will you maximise fundraising? Are you building in profit when pricing ticket price, raffle and/ or auction? Can you include ice breaker games where people donate to take part (suitable prizes such as a table centrepiece)
- Could you add a small number of vendor stalls with audience-appropriate wares that could pay a vendor fee, donate a prize and make a percentage donation of their sales? (This works inside as well for large-scale events if the venue has room)
- Who is responsible for getting prizes?
- Do you need an ERP or Emergency Response Plan (only required for larger scale events such as a ball or mass participation event, knowing how you will get help in the event of an emergency and having contact information to hand on the day is fine for a small event such as sponsored walk or bake sale)
- If you are taking any cash, do you have volunteers or staff to double count the cash, a safe locked room in which to do this, access to a safe throughout and post-event to keep money protected? If you are expecting to take large sums of cash, how will this be deposited safely (think about the safety of any volunteers/staff physically transporting cash).

If you need any support with your event or have any questions. Our Fundraising Manager would be happy to assist and help with creating an Event Plan, ERP, Risk Assessments, etc. alongside you and your team. Contact Clara Gill on fundraising@acctuk.org or call 07823 811390.