



## Auction Planning Timeline with an event

### 12-6 MONTHS prior to auction

#### Goals & Operations:

- define goals, purpose & budget
- recruit committee volunteers
- determine auction type
- determine event specifications
- decide on auction platform program and communication strategy
- define event ticket pricing
- define theme, messaging & graphics
- communicate status of all teams
- thank all volunteers

#### Procurement:

- define target bidding audience
- brainstorm donation requests that will interest the bidding audience (i.e. tutoring for school age families, or animal care services for animal lovers)
- create a spectacular procurement letter

#### Event Planning:

- decide on event date
- book venue
- choose theme
- choose food
- choose entertainment/ music/ DJ/ live auctioneer
- solicit a key note speaker or presenter
- choose emcee and/or live auctioneer

- depending on venue decide its all inclusive or will you need to hire independently
- consider tables, chairs, linens, tableware, servingware, drinks bar, bartender and service personnel include in the planning additional tables for silent auction

### Marketing:

- Create online auction presence for procurement team to maximize donor exposure
- Market Save-the-Date to potential bidders & attendees
- create a video appeal with a call-to-action, share it with all stakeholders and ask them to share too
- coordinate all materials to match theme or logo: invites, website, stationery, social profile pictures and headers

### Auctria program best practices:

- use Auctria from day 1 to track all data
- add key committee members as users to input review live data & reports
- donor logo and website for donors, this will hyperlink to their webpage, this a huge selling point the procurement team can use to encourage donors to give
- set-up website early in the process to increase procurement success
- website templates are quick and easy to use and customize
- set-up website to accept straight monetary donations throughout the entire auction process
- track all donation requests
- post save the date and promote any key note speaker or emcee personality
- link video appeal from auction website
- Get social with Auctria and other that are fundraising just like you. Procurement inspiration can be found on our Pinterest boards, connect on Facebook with fellow fundraising colleagues, Twitter for quick tips and links.

## 3-6 MONTHS prior to auction

### Operations:

- review status of goals, purpose & budget
- set up structure for auction website
- set-up donor tracking mechanism
- recruit and coordinate volunteers
- order decorations and ancillary party prep
- communicate status of all teams
- thank all volunteers

### Financial Operations:

- set-up or review banking procedures and protocol
- integrate credit card processing with auction system

### Procurement:

- plan out which volunteers will be soliciting which donors; this can be done by geography, industry type or individually
- 6 months out- send out letters to larger corporations, sports teams, theme parks, hotels
- 3 months out- send out letter to smaller local businesses
- track all donor requests
- track all donations
- load all donations in system with detailed descriptions and photos
- create procurement letter
- hand deliver and request from local retail establishments, restaurants

### Event Planning:

- create invite list and method(s) of communications
- create save the date mailing/ emailing
- create invitations
- create rsvp timeline

### Marketing:

- use social media to promote save-the-date
- create theme or use logo
- order any custom printing service items
  - invitations
  - signage
  - banner
  - marketing
  - giveaways
  - flyers

- review & customize bid catalog
- prepare mailing lists to re-market to past bidders or past supporters
- create and schedule all marketing promotions counting down to event day:
  - promote pre-sales of event tickets, consider early bird discount pricing
  - promote raffle ticket sales
  - promote online bidding
  - promote pre-registration for bidders
  - promote links to entire online catalog
  - promote individual auction items
  - promote keynote speaker
  - promote emcee

#### Auctria program best practices:

- track all donors and donations
- review dashboard report
- collect logos for donors to be used online in donor list and in printed catalog
- collect donor website information to hyperlink logo to their website
- import & export past bidder and emails to favorite email program
- income Infusers can be sold online as Donations or For-Sale Items
- Auction catalog is auto created with just a few clicks or more customized with easy-to-use templates
- create customized headers/ footers: bid sheets, certificates, display pages
- create customized stationary for: statements, receipts, and forms
- establish or review Stripe Credit Card processing system to fully integrate with auction

## 2-1 MONTH prior to auction

### Operations:

- test all auction systems
- Income infusers such as raffle, event ticket pre-sale pricing, straight-bid from the heart should be finalized
- begin pre-sale event tickets
- organize timelines for:
  - closing silent auction by category
  - raffle pull
  - live auction
  
- create volunteer schedule for lead up to event, during and post-event
- recruit and train volunteers
- draft bid catalog
- create bid handles (number paddles)

### Procurement:

- continue follow-up on procurement letters
- offer to pick up any donated items
- record all donors and donations
- this is a great time to pound the pavement for local donations, many will donate on the spot when the donation letter is personally delivered and accompanied by a smile

### Event Planning:

- walk-through space with vendors to uncover any bumps
- finalize space planning with access to electricity, wifi, lights
- finalize food choices

### Marketing:

- formal invitations distributed 4-6 weeks (either hard copy or e-invite) with an RSVP and call to action to purchase event tickets and pre-register
- follow-up formal invites with informal social media at least 2x a week leading up to event date
- market in a variety of days and times to capture the audience at different times in their routine
- weekend marketing pushes are ok too
- follow or modify marketing & promotion plan developed earlier

## 4-2 WEEKS prior to auction

### Operations:

- review status of goals, purpose & budget
- work with procurement team to check all auction pricing: starting bid, bid increments, buy-it now, live vs. silent
- begin pre-sale for raffle tickets
- begin pre-registration for bidders
- begin online bidding (if applicable)
- create script for emcee and live auctioneer
- draft timeline for during event
- draft timeline for pre & post event
- communicate status of all teams
- thank all volunteers

### Financial Operations:

- test credit card services if not completed already
- document finance procedures & protocol
- train finance collection team

### Procurement:

- final call-out for donations
- load all donor acknowledgements, websites in system
- load all donations in system with detailed descriptions and photos

### Event Planning:

- collect RSVPs
- finalize head-count
- finalize vendor specifications
- organize timeline with auction team for master schedule of events:
  - bidder check-in
  - silent auction closings
  - timing for food service
  - check-out
  - clean-up
- consider booking a venue and date for next year

### Marketing:

- formal invitations distributed (either hard copy or e-invite) with an RSVP and call to action to purchase event tickets and pre-register
- follow-up formal invites with informal social media at least 2x a week leading up to event date
- market in a variety of days and times to capture the audience at different times in their routine

- weekend marketing pushes are ok too
- promote pre-sales of event tickets, consider early bird discount pricing
- promote raffle ticket sales
- promote online bidding
- promote pre-registration for bidders
- promote links to entire online catalog
- promote individual auction items
- promote keynote speaker
- promote emcee
- re-market to past bidders or past supporters

#### Auctria program best practices:

- review dashboard report on front page of auction summary
- review and adjust goals accordingly
- change credit card processing from Test to Live mode to begin accepting payments online
- open early bird event sales online
- Facebook & Twitter, link auction website or individual items to followers
- encourage posting, sharing, tweeting by audience to increase awareness
- complete documentation and user guide makes training for close-out consistent
- ask volunteers to meet to train on the demo website, treat them to a nice cup of coffee and they will for sure show up

## 1-2 WEEKS prior to auction

### Operations:

- review status of goals, purpose & budget
- review dashboard reports
- finalize timeline for event day, include set-up and breakdown
- finalize detailed timeline for actual event, include: check-in, raffle pull times, announcements, keynote speaker, live auction, close-out times, food service times, check-out
- finalize and review script for emcee and live auctioneer
- print bid sheets
- print display pages
- print certificates
- print bid catalog
- print place cards
- organize and tag all auction goods for display and distribution at event
- train volunteers in check-on and check out procedures
- train volunteers in bid closeout procedures
- organize day of supplies and day of checklist (see below)
- communicate status of all teams
- thank all volunteers

### Procurement:

- finalize inventory
- tagging & organizing all items
- procurement is closed, but you may want to consider exceptions

### Event Planning:

- finalize table settings and venue set-up
- finalize head count with food vendors
- coordinate timeline of event with operations team and communicate with vendors for all food service

### Marketing:

- final promotion push
- encourage social media posting and sharing
- if walk-up seats are available promote as such
- countdown to event 3 days, 24 hours, tonight/today
- foster attendance 'sneak peek' of menu or dessert choices, pictures are thousand words
- promote with top auction items
- share, post, tweet auction pages
- share, post tweet interesting auction items

## Auctria program best practices:

- bidders should be pre-registering
- event tickets can be sold online
- pre-sale raffle tickets
- pre-sale drink tickets
- each page and each auction item can be shared on FB, Twitter
- if you are doing an online auction proxy bidding and buy-it-now may be open
- print live auction item display pages for auctioneer to review
- print display pages
- print bid sheets
- print bid catalog
- user guide is easy to share with volunteers to review
- review starting bid and increments with auctioneer
- continue sales and promotion

## PREPARATIONS & EVENT day/night of auction

### Event Operations:

- communicate event timelines with all vendors and volunteers
- party set-up & breakdown
- tip service people
- communicate status of all teams
- greet all volunteers and advise of time shifts and duties
- thank all volunteers
- announce next year's auction event, or upcoming significant function

### Auction Operations:

- organize bidder check-in & out, payment table and goods collection
- silent and live auction set-up
- clearly indicate closeout times for items
- bid sheets and a display page are furnished to advertise each item
- clearly mark closing times for category or individual items
- emcee announces last chance to bid on silent categories
- assign raffle ticket sales
- pull raffle ticket winners
- close each category in a predetermined fashion
- record highest bidder information
- conduct the live auction
- close-out services collect final donations
- distribute winning goods & certificate

### Marketing:

- if allow walk-ups are allowed promote this during the 12 hour lead-up to the event
- post, tweet pictures of pre-event activities & reminders of the big event
- all those that cannot attend appeal for donations online from the heart

### Auctria program best practices:

- Auctria is web based any internet connection will allow you to access all auction functionality
- For Sale Items can be processed with bidder number such as raffles sales, drink tickets
- if connectivity difficulties are foreseen an offline downloadable version is available
- pre-registered bidders should have credit card on file already and a simple check-in to pick up a bid paddle is all that's needed
- register day-of bidders upon arrival (optional but doing so will make for a smoother close-out and collection process)
- check-out bidders in bulk or individually

- email bidder statements
- email bidder receipts

## POST AUCTION duties

### Operations:

- distribute all SOLD auction items
- all UNSold auction items can be re-opened online for quick sale after the event is over
- online auction can be auto-closed and billed
- close silent auction items systematically or by category for a smooth check-out
- financial reconciliations
- distribute the auction goods
- if there was an onsite event most goods and certificates should be distributed on location otherwise distribute the auction goods
- last call to all those that did not attend to donate from the heart with a straight donation
- thank you letters and receipts to donors
- final receipts to bidders
- final notes and critique should be completed shortly after the event to record best practices for subsequent events
- thank volunteers

### Retrospective Review:

- document review findings
- review status of goals, purpose & budget
- review vendor services for quality and value
- review donations successes and opportunities
- review pricing strategy for event
- review pricing strategy for auction items

### Marketing:

- publicly thank donors and bidders
- broadcast event success
- share how donations will be appropriated
- announce next year's event date & location

## Auctria program best practices:

- review status of goals, purpose & budget
- online auction can be auto-closed and billed
- close silent auction items systematically or by category for a smooth check-out
- financial reconciliations
- distribute the auction goods

- if there was an onsite event most goods and certificates should be distributed on location otherwise distribute the auction goods
- last call to all those that did not attend to donate from the heart with a straight donation
- thank you letters and receipts to donors
- final receipts to bidders
- final notes and critique should be completed shortly after the event to record best practices for subsequent events
- thank volunteers

**DAY OF EVENT CHECKLIST** suggestions

- pens
- pencils
- calculator
- paper
- computer/ laptops/ tablets
- chargers
- hot spot
- stapler
- tape (narrow and wide)
- name tags
- bidder handles
- schedule of events
- print-out any back-up documents (bidder list, item list)
- print-out documents for live auctioneer
- financial items (cash, cash box, credit card services)
- final checks for balance due for vendors
- volunteer schedule and assignments

add your own here:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_