



AUCTION PLANNER

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Organizing a successful benefit auction takes thoughtful planning and dedication. Based on our experience at thousands of events nationwide, we have created this auction planning guide as a tool to help you achieve your event goals. It provides an overall timeline, with specific action items for each step in the process, best practice guidelines, tricks and tips, an area for notes specific to your action items, and a section where you can jot down key contact information. We've also included a handy pocket in the back of this guide where you can keep paperwork related to your auction.

We hope you find this guide helpful—and we wish you success with all your fundraising efforts!

[**www.greatergiving.com**](http://www.greatergiving.com)

Target Schedule

Start Date _____ Completion Date _____

Key People/Resources

GETTING STARTED



Action Items

Priority Date Due Complete

- | | | | |
|-----|-----|--------------------------|--|
| ___ | ___ | <input type="checkbox"/> | Select a chairperson or leader who has strong leadership and organizational skills and is able to commit to the entire event process. |
| ___ | ___ | <input type="checkbox"/> | Talk with previous leader(s) for feedback on what worked well and what did not—incorporate those findings into your plan. |
| ___ | ___ | <input type="checkbox"/> | Review the previous year's event history and resources, including budget and revenue, donor sales, sponsorship records, and operations. |
| ___ | ___ | <input type="checkbox"/> | Create an auction planning binder* for the current year, containing key event information, such as budgets, vendor information, contracts, invoices, floor plans, contacts, collateral material, and more. |
| ___ | ___ | <input type="checkbox"/> | Form a steering committee and sub-committees. |
| ___ | ___ | <input type="checkbox"/> | Establish your event budget and set attendance and revenue goals. |
| ___ | ___ | <input type="checkbox"/> | Contact Greater Giving to learn which solutions can help your event run more effectively. |
| ___ | ___ | <input type="checkbox"/> | Consider adding online elements to enhance your live event, such as online registration, publishing a pre-show online catalog, and hosting an online auction using Greater Giving fundraising solutions. |
| ___ | ___ | <input type="checkbox"/> | Select a date, venue, and auctioneer. Consider space needs, availability, parking, community calendars, and in-demand dates such as holidays and major sporting events. |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |

*Planning Binder

The planning binder is crucial to the event planning process. It contains all pertinent event information, such as budgets, vendors, contracts, invoices, floor plans, collateral material, etc. Use this binder during the current year planning cycle and as a history and reference point for the next event.

Notes

Greater Giving Tip

Fundraising professionals today utilize event management software to electronically manage their event planning from beginning to end. With Greater Giving Event Software you can easily keep track of all the details of your event—saving valuable time for your committee and creating a more relaxed environment for your guests.

9–12 MONTHS BEFORE THE AUCTION



Target Schedule

Start Date _____ Completion Date _____

Key People/Resources

Notes

Action Items

Priority Date Due Complete

- | | | | |
|-----|-----|--------------------------|--|
| ___ | ___ | <input type="checkbox"/> | Establish firm procurement* goals and deadlines. Identify the best-selling items from previous events and include those in your goals. |
| ___ | ___ | <input type="checkbox"/> | Schedule a procurement meeting with committee members to brainstorm and generate ideas about hot items to target. |
| ___ | ___ | <input type="checkbox"/> | Encourage procurement volunteers to explore their personal networks for possible donations and sponsors. |
| ___ | ___ | <input type="checkbox"/> | Identify sponsorship opportunities and benefits. |
| ___ | ___ | <input type="checkbox"/> | Consider hiring a graphic designer to create the event promotional materials—especially the invitation and website design. |
| ___ | ___ | <input type="checkbox"/> | Review and update your donor, sponsor, and procurement contributor lists, including email and postal addresses and phone numbers. |
| ___ | ___ | <input type="checkbox"/> | Create Web pages promoting the auction. If using Greater Giving Event Software Online, set up registration and donation pages to sell tickets, accept donations, and securely accept credit card payments online. |
| ___ | ___ | <input type="checkbox"/> | Add an item donation link to your website. |
| ___ | ___ | <input type="checkbox"/> | Identify potential speakers and individuals to recognize during the program. Consider recruiting an emcee for the evening. Start recruiting those speakers and reaching out to those you wish to recognize at the event to confirm their availability. |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |

Greater Giving Tip

Give procurement volunteers specific goals so they can focus their efforts. Make sure procurement volunteers have plenty of procurement forms, so they can solicit donations spontaneously. Give them an electronic version as well—to email multiple contacts at once. Also consider adding a “Donate Items” link to your website and any email correspondence.

Greater Giving Tip

Increase auction revenue by hiring a professional benefit auctioneer. They are professional fundraisers for your cause, who can boost revenue by motivating your guests to bid more. See our list of auctioneer partners at www.greatergiving.com/partners/partners-list/marketing-partners/benefit-auctioneers.aspx.

*Procurement

The process by which auction staff and volunteers seek out and obtain donated items to sell at a benefit auction. Arm volunteers with donor forms for soliciting donations. Also add procurement requests or a “Donate Items” link to your site.

Target Schedule

Start Date _____ Completion Date _____

Key People/Resources

5–8 MONTHS BEFORE THE AUCTION



Action Items

Priority Date Due Complete

- | | | | |
|-----|-----|--------------------------|---|
| ___ | ___ | <input type="checkbox"/> | Send procurement letters and emails. |
| ___ | ___ | <input type="checkbox"/> | Create and send “Save the Date” cards and email to promote the event to donors, patrons, and guests. |
| ___ | ___ | <input type="checkbox"/> | Begin tracking procurement, sponsorship, and guest information manually or in Event Software Online. |
| ___ | ___ | <input type="checkbox"/> | Formulate a timeline* for the day prior to and day of your event. Remember to include a time slot for your Special Appeal and other specific agenda items. |
| ___ | ___ | <input type="checkbox"/> | Develop an invitation list including email addresses when possible. |
| ___ | ___ | <input type="checkbox"/> | Hire a professional sound and lighting company to ensure proper sound and light equipment for your event. Many venues are not optimally equipped for an auction event. |
| ___ | ___ | <input type="checkbox"/> | Confirm availability of program speakers and honorees. |
| ___ | ___ | <input type="checkbox"/> | Review Greater Giving Auction Booster travel and experience packages to determine which ones would appeal to your donors. |
| ___ | ___ | <input type="checkbox"/> | Identify the Special Appeal and develop a series of email campaigns to engage potential attendees and sponsors in your cause or project. |
| ___ | ___ | <input type="checkbox"/> | Review procurement results and compare currently procured items and your potential revenue to your goal so you have lead time to escalate procurement efforts and outreach. |
| ___ | ___ | <input type="checkbox"/> | Make sure you have a space prepared to catalog and secure auction items. |
| ___ | ___ | <input type="checkbox"/> | _____ |

*Timeline

An event timeline is a detailed schedule of all aspects of the day before and the day of the event—including the volunteer schedule, registration, silent auction sections, live auction, event program, and other activities. Creating a detailed event timeline will help you maximize every minute of your event. Find timeline suggestions at www.greatergiving.com/resource-library/fundraising-tips.aspx.

Notes

Greater Giving Tip

Incorporate ways for guests to donate even if they cannot attend. All event materials and invitations should include a website address for direct donation as well as online registration. This can be done through Greater Giving Online Payments.

2-4 MONTHS BEFORE THE AUCTION



Target Schedule

Start Date _____ Completion Date _____

Key People/Resources

Notes

Action Items

Priority Date Due Complete

- | Priority | Date Due | Complete |
|----------|----------|--|
| ___ | ___ | <input type="checkbox"/> Define event banking procedures. |
| ___ | ___ | <input type="checkbox"/> Reserve Auctionpay card readers or terminals for on-site credit card processing. |
| ___ | ___ | <input type="checkbox"/> Hire a Greater Giving Event Consultant to assist at your event. |
| ___ | ___ | <input type="checkbox"/> Consider using mobile bidding to reduce paperwork and drive more bidding. |
| ___ | ___ | <input type="checkbox"/> Reserve the Auction Booster packages that will appeal to your audience. Remember that Booster packages can be sold multiple times at your event. |
| ___ | ___ | <input type="checkbox"/> Finalize invitation list and mail invitations. |
| ___ | ___ | <input type="checkbox"/> Recruit volunteers for the day before the auction and auction night activities. Create a volunteer contact list. |
| ___ | ___ | <input type="checkbox"/> Outline registration and checkout procedures. |
| ___ | ___ | <input type="checkbox"/> Perform a site walk-through with the venue's catering manager—consider the floor plan, food, timing, flow, and special needs. Identify space where volunteers can safely store their personal items and take a scheduled break. |
| ___ | ___ | <input type="checkbox"/> Package* items together to create one-of-a-kind offerings. |
| ___ | ___ | <input type="checkbox"/> Create an online auction website and begin a series of email campaigns to engage constituents. |

Greater Giving Tip

Accepting credit cards at your event will significantly boost revenue and provide added convenience for your guests. Auctionpay card readers or terminals securely capture guests' credit card information at registration and streamline the checkout process. This creates a better experience for guests and ensures quick, easy, and secure transactions.

* Packaging Items

Package related items together to create a one-of-a-kind offering. For example, a group of gift certificates for services at a salon can be grouped as a "Day of Beauty." This is also a good way to utilize "orphaned" or "odd lot" items and differentiate your event. For more details, see https://m1.greatergiving.com/mk/get/FUNDEXCELLENCE_PT3.

Target Schedule Start Date Completion Date

Key People/Resources

3-4 WEEKS BEFORE THE AUCTION



Action Items

Priority Date Due Complete

- | | | | |
|-----|-----|--------------------------|--|
| ___ | ___ | <input type="checkbox"/> | Email* a preliminary catalog or teaser information about selected auction items to generate excitement. |
| ___ | ___ | <input type="checkbox"/> | Finish procurement. Enter final items into software. |
| ___ | ___ | <input type="checkbox"/> | Inventory auction items and certificates you've already collected and actively collect the items and certificates not in your possession. |
| ___ | ___ | <input type="checkbox"/> | Produce display boards for silent auction items. |
| ___ | ___ | <input type="checkbox"/> | If using computers and printers at the event, coordinate computer equipment and on-site technical support. |
| ___ | ___ | <input type="checkbox"/> | Finalize the online auction website and prepare to launch next week. |
| ___ | ___ | <input type="checkbox"/> | Create a floor plan with the venue or caterer—identify traffic flow and possible pinch points. |
| ___ | ___ | <input type="checkbox"/> | Finalize event program. |
| ___ | ___ | <input type="checkbox"/> | Create program material, including slide presentations, speeches, and emcee remarks, and send to speakers so they can prepare for a rehearsal. |
| ___ | ___ | <input type="checkbox"/> | Schedule a mandatory program rehearsal for two weeks before the auction. |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |

Notes

Greater Giving Tip

Display silent auction items in creative ways to generate excitement. For example: set up a bowl with tropical fish surrounded by sand to promote an Auction Booster beach package. Consider selling the package for a set price in multiples, to encourage groups of friends to sign up. For Auction Booster travel package ideas visit <https://pedsa.greatergiving.com/booster/>.

Greater Giving Tip

Procurement should be completed one month prior to the auction to allow adequate time to print and distribute the catalog, as well as prepare display boards and signage.

*Email Communications

Email is an excellent way to send information to registered attendees or to send last-minute reminders to those constituents who have not yet responded. Remind donors that you offer an online donation option, so they can donate even if they cannot attend your event.

2 WEEKS BEFORE THE AUCTION



Target Schedule

Start Date _____ Completion Date _____

Key People/Resources

Notes

Action Items

Priority Date Due Complete

- | Priority | Date Due | Complete |
|----------|----------|--|
| ___ | ___ | <input type="checkbox"/> Assign items to live and silent auction sections. |
| ___ | ___ | <input type="checkbox"/> Sequence the live auction items*. |
| ___ | ___ | <input type="checkbox"/> Finalize and print the auction catalog. Conduct a planning call with your auctioneer prior to finalizing the catalog—he might see some issues with the item sequence or the items themselves that you may not have spotted. |
| ___ | ___ | <input type="checkbox"/> Assemble event materials and supplies to deliver to the venue. |
| ___ | ___ | <input type="checkbox"/> Conduct a rehearsal with your speakers to ensure they are comfortable with their material. |
| ___ | ___ | <input type="checkbox"/> Finalize program script and set up a dress rehearsal at the venue the day of the event. |
| ___ | ___ | <input type="checkbox"/> Create a day-of-event volunteer responsibilities list and schedule—send to volunteers so they can be prepared. Follow up with calls to all volunteers to ensure they have received the information and are still committed. |
| ___ | ___ | <input type="checkbox"/> Organize all auction items and displays for delivery to venue. |
| ___ | ___ | <input type="checkbox"/> Create directional or promotional signage. |
| ___ | ___ | <input type="checkbox"/> Verify certificates. Create certificates if none are given with item. Put them in chronological order by package number in a separate file. |
| ___ | ___ | <input type="checkbox"/> _____ |
| ___ | ___ | <input type="checkbox"/> _____ |
| ___ | ___ | <input type="checkbox"/> _____ |

Greater Giving Tip

Publicize use of Greater Giving in pre-event materials and on-site signage, letting guests know that efforts have been made to make their check-in and payment process quick and easy. Give a script to your registration volunteers, so that they can effectively explain the process to guests.

*Live Auction Sequence

The order in which items are sold during the live auction can often be as important as the items themselves. Placing items in a specific sequence can increase auction revenue. For tips visit www.greatergiving.com/resource-library/fundraising-tips.aspx.

Target Schedule

Start Date _____ Completion Date _____

Key People/Resources

1 WEEK BEFORE THE AUCTION



Action Items

Priority Date Due Complete

- | | | | |
|-----|-----|--------------------------|--|
| ___ | ___ | <input type="checkbox"/> | If using Event Software at check-in and checkout, finalize arrangements for computer and printer set-up and networking. |
| ___ | ___ | <input type="checkbox"/> | Prepare detailed catalog for auctioneer. |
| ___ | ___ | <input type="checkbox"/> | Provide caterer or hotel with final guest count for meals. |
| ___ | ___ | <input type="checkbox"/> | Receive delivery of Auctionpay card readers or terminals. Check to ensure that your shipment is complete and test the equipment. |
| ___ | ___ | <input type="checkbox"/> | Hold a meeting to train volunteers; communicate expectations, timelines, and schedules*. |
| ___ | ___ | <input type="checkbox"/> | Create an addendum to the catalog for last-minute items. |
| ___ | ___ | <input type="checkbox"/> | Print bid sheets from Event Software Online. Take to printer for duplicate/triplicate carbonless copies. If you are using mobile bidding at your event, you can eliminate this step. |
| ___ | ___ | <input type="checkbox"/> | Assign guests to tables. |
| ___ | ___ | <input type="checkbox"/> | Assign bidder numbers to guests. |
| ___ | ___ | <input type="checkbox"/> | Finalize bidder packets, which usually include a catalog, bidder number, and table number. |
| ___ | ___ | <input type="checkbox"/> | Create walk-in registration packets. |
| ___ | ___ | <input type="checkbox"/> | Make sure all auction packages have their package number assigned and attached. |
| ___ | ___ | <input type="checkbox"/> | Enter last minute registrations three days prior to the auction. |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |

*Volunteer Schedules

Creating detailed schedules for each of your volunteers will ensure that you have adequate coverage in every area of your event. Remember to schedule break times for volunteers so they can stay energized throughout the evening.

Notes

Greater Giving Tip

Accurate bidder numbers are key to a smooth event. All registered guests should be assigned a bidder number 24–48 hours prior to the event. You can complete this process in a few simple steps with Event Software.

Greater Giving Tip

Fill a large craft supply box with essential items such as staplers, pens, highlighters, scissors, and anything else you may need at your event. Pack plastic tubs with supplies by group and label them. For example: A “Computer Supply” tub will contain extra printer paper, extra toner, duct tape, and power strips with surge protectors.

DAY BEFORE AND DAY OF THE AUCTION



Target Schedule

Start Date _____ Completion Date _____

Key People/Resources

Notes

Action Items

Priority Date Due Complete

- | | | | |
|-----|-----|--------------------------|--|
| ___ | ___ | <input type="checkbox"/> | Print addendum to the catalog. |
| ___ | ___ | <input type="checkbox"/> | Print registration lists and all reports pertinent to the event. |
| ___ | ___ | <input type="checkbox"/> | Print final day-of-event schedule and distribute to event staff and volunteers. |
| ___ | ___ | <input type="checkbox"/> | Deliver all items and event materials to venue. |
| ___ | ___ | <input type="checkbox"/> | Print out package list for verification of packages. |
| ___ | ___ | <input type="checkbox"/> | Print out placard signage for each item. |
| ___ | ___ | <input type="checkbox"/> | Match up each package with bid sheet. |
| ___ | ___ | <input type="checkbox"/> | Create an organization contact sheet* to hand out at checkout. |
| ___ | ___ | <input type="checkbox"/> | The day of the event, conduct a program dress rehearsal at the event venue. |
| ___ | ___ | <input type="checkbox"/> | The day of the event, complete on-site auction set up. |
| ___ | ___ | <input type="checkbox"/> | Several hours prior to the event start, hold a brief "all-hands" meeting for volunteers and staff to review event night roles and responsibilities and answer any last-minute questions. Encourage check-in and checkout volunteers to review the Auctionpay training they received earlier in the week. |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |
| ___ | ___ | <input type="checkbox"/> | _____ |

Greater Giving Tip

Provide a meal for volunteers and staff prior to the event—use the time to thank your volunteers and answer last-minute questions. Ask registration and checkout volunteers to not take open beverages to their stations, since they may spill onto electrical equipment.

Greater Giving Tip

Have a drawing for guests who register a credit card at registration. Use an item or two from the silent auction as the prize. This will encourage participation in the Express Pay process.

*Organization Contact Sheet

A list of contacts within your organization and their area of responsibility. Providing this sheet at checkout will allow guests with questions after the event to get to the right person right away.

Target Schedule Start Date Completion Date

Key People/Resources

AFTER YOUR EVENT



Action Items

Priority Date Due Complete

- | | | | |
|-----|-----|--------------------------|---|
| ___ | ___ | <input type="checkbox"/> | Post all check and cash payments into Greater Giving Event Software. |
| ___ | ___ | <input type="checkbox"/> | Reconcile amounts due prior to submitting credit charges to the bank*. |
| ___ | ___ | <input type="checkbox"/> | Submit charges to the bank. Resubmit declines—banks sometimes require an approval code before confirming a charge. |
| ___ | ___ | <input type="checkbox"/> | Data backup and archive. |
| ___ | ___ | <input type="checkbox"/> | Finalize date for next year's event. |
| ___ | ___ | <input type="checkbox"/> | Thank-you letters to sponsors, donors, and guests. Include next year's event date in the letter. |
| ___ | ___ | <input type="checkbox"/> | Reconcile budget, expenses and revenue to determine event results. |
| ___ | ___ | <input type="checkbox"/> | Update auction contact list. |
| ___ | ___ | <input type="checkbox"/> | Acknowledgements for volunteers (thank-you cards or a gathering). |
| ___ | ___ | <input type="checkbox"/> | Hold a post-event party and debriefing with volunteers and staff. |
| ___ | ___ | <input type="checkbox"/> | Update event binder for next year. |
| ___ | ___ | <input type="checkbox"/> | Return Auctionpay card readers or terminals within 4 business days after your event. |
| ___ | ___ | <input type="checkbox"/> | Evaluate success of online auction—schedule another for a few months out. If you have items from the event that did not sell, consider having a post-event online auction to sell them. |
| ___ | ___ | <input type="checkbox"/> | Order Auction Booster packages within 7 days of your event. |
| ___ | ___ | <input type="checkbox"/> | Arrange for shipment or delivery of items that were not picked up the night of the event. |

*Bank Reconciliation

After the event, verify that all cash, check, and credit card payments correspond with the winning bids for the live and silent auctions and any other donations made at the event. Double-check the final purchase amounts prior to using the Auctionpay card readers or terminals to send charges to the bank.

Notes

Greater Giving Tip

Provide a senior staff member with a detailed log of the issues that came up at the event. She can then personally contact guests who require special handling. This extra touch may salvage some very important donor relationships.

CONTACTS

Name _____ Company _____
Direct _____ Cell _____
Email _____ Website _____
Notes _____

Name _____ Company _____
Direct _____ Cell _____
Email _____ Website _____
Notes _____

Name _____ Company _____
Direct _____ Cell _____
Email _____ Website _____
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Name _____ Company _____
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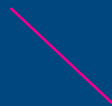
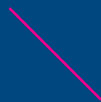
CONTACTS

Name _____ Company _____
Direct _____ Cell _____
Email _____ Website _____
Notes _____

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Direct _____ Cell _____
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Name _____ Company _____
Direct _____ Cell _____
Email _____ Website _____
Notes _____

Name _____ Company _____
Direct _____ Cell _____
Email _____ Website _____
Notes _____



Greater Giving works exclusively with schools and nonprofit organizations of all sizes to improve their fundraising events, and help them achieve their year-round fundraising goals. Greater Giving solutions are easy-to-use, improve donor experiences, and, most importantly, help increase revenue.

In addition to the Auction Planner, Greater Giving offers fundraising tips, Web seminars, informational guides, product demos, training resources, and more on our website.

Call us or visit our website today to learn how Greater Giving can help you take your event to the next level.

Dedicated
to nonprofit
fundraising
success.



800-276-5992

info@greatergiving.com

1920 NW Amberglen Pkwy

Suite 140

Beaverton, OR 97006

www.greatergiving.com