Planning the Un-Gala  
A 10-Step Planning Outline

#1: What’s your overall goal?  
Every fundraising event has to have an overarching goal. Is it to get new donors? Improve retention of existing donors? Upgrade major donors? What are you trying to accomplish? Hint: the best events have one goal!

#2: What are your specific objectives?  
Have SMART (specific, measurable, achievable, realistic, time-bound) objectives for your event. But, beware of having too many objectives for your event. Focus!

Financial Objective: How many dollars raised? ____________________________

Participation Objective: How many people come? __________________________

Gift Objectives: How many people give? _________________________________

Upgrade Objective: How many people will upgrade? ______________________

Acquisition Objective: How many NEW people attend/give? ______________

Other Objective: _______________________________________________________
#3: Who is your target audience?

Given your overall goal and SMART objectives, who is your target audience? This decision will help you to form your invite list.

#4: What’s your concept?

In the context of your goals and objectives, consider:

___ brand  ___ mission-fit  ___ sustainability  ___ resources available
___ ask or no ask  ___ follow-up strategy  ___ opportunity cost

#5: Who’s your team?

Staff _______________________________________________________

Volunteers ___________________________________________________

#6: How will you make money?

Ticket sales: $____ per ticket x _____ sold =

Pre-event contributions: _____ gifts x $ ______ average gift =

Day of event contributions: _____ gifts x $ ______ average gift =

Post-event contributions: _____ gifts x $ ______ average gift =

Other revenue: __________________________
#7: What’s it going to cost?

**Indirect expenses:**

Estimated staff cost: estimated # hours x approximate hourly rate = ______________ (for each staff member involved)

**Direct event expenses:**

Day of event costs: ________________________________

Marketing & PR costs: ________________________________

Event planning/consulting: ________________________________

Follow-up materials: ________________________________

Other: ________________________________

Other: ________________________________

**TOTAL EXPENSES:** ______________

**NET INCOME:** ______________

#8: Who is doing what?

Create your own spreadsheet just like this one:

<table>
<thead>
<tr>
<th>Task</th>
<th>Who?</th>
<th>By When?</th>
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<tbody>
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Be specific!
#9: **What’s the post-event strategy?**
What will you do **after** the event to make sure your objectives are met?
How will you THANK event participants?

How will you CONVERT event participants?

How will you SOLICIT event participants (if you didn’t at the event)?

#10: **How will you know if you succeeded?**
What is your plan for creating an analysis of the event? Consider:
___ post-event de-briefs _____ looking at the numbers ___evaluations