



Fundraising Gala & Event Planning Check Sheet

Use this check sheet as a practical companion to your event planning process, not a one-time task to complete and file away. Start by reviewing each section with your team, adjust based on the type of event you are planning, identify where decisions or details are still missing, and assign clear owners and deadlines. Revisit it at key milestones to keep your strategy, guest experience, fundraising goals, and follow-up aligned from first idea through post-event stewardship.

Timing	Date	Deliverable	Notes / Resource	Owner	Complete	Notes/Status
12-10 months out		Confirm fundraising goal	Goal approval			
		Confirm budget	Budget and finance tracker			
		Reserve venue	Venue contract			
		Confirm date	Master calendar			
		Build your team	Project plan with owners & dependencies			
10-8 months out		Approve theme	Theme approval			
		Finalize sponsorship package	Sponsorship packet			
		Finalize audience strategy	Audience targets			
		Create save-the-date	Print and digital asset			
		Create digital assets	Initial communications toolkit			
		Recruit hosts	Host outreach list			
		Confirm auctioneer	Talent agreement			
		Recruit volunteers	Volunteer list			
8-6 months out		Launch sponsor outreach	Outreach tracker			
		Start auction procurement	Procurement tracker			
		Launch event page	Event landing page			
		Begin story collection	Interview plan and approvals			
		Create invitation assets	Print and digital invitation files			
		Build ticketing assets	Registration flow			
		Create item packaging checklist	Auction packaging list			
6-4 months out		Open ticket sales	Ticketing platform live			
		Confirm entertainment	Entertainment contract			
		Confirm table captains	Table captain roster			
		Draft case for support	Core fundraising narrative			
		Finalize message hierarchy	Message map			
4-3 months out		Finalize run-of-show draft	Run-of-show outline locked			
		Set decor direction	Decor team brief			
		Finalize volunteer structure	Volunteer org chart			
		Build script deck	Speaker and stage scripts			
		Finalize signage plan	Signage schedule			

		Create print schedule	Print production timeline			
3-2 months out		Push ticket sales campaign	Ticket campaign calendar			
		Brief team on guest invite	Invitation Talking Points			
		Confirm AV	AV scope and vendor confirmation			
		Finalize case for support	Approved fundraising case			
		Finalize printed materials	Print-ready files			
		Create volunteer training guide	Volunteer guide			
		Create host training guide	Host guide			
		Create Invite Talking points	Distribute talking points to team			
8-6 weeks out		Hit print deadlines	Print handoff			
		Finalize seating strategy	Seating framework			
		Finalize item packaging	Packaging checklist			
		Draft scripts	Draft script set			
		Finalize check-in plan	Check-in workflow			
		Create curtain warmer	Pre-show slides or content			
		Complete final print handoff	Production approval			
4-2 weeks out		Conduct final walkthrough	Venue walkthrough notes			
		Train volunteers	Volunteer session			
		Run rehearsal	Lighting, sound, slide, and staging cues			
		Send guest reminders	Final reminder emails			
		Confirm receipt of printed materials	Inventory check			
		Finalize curtain warmer	Pre-show content approval			
Event week		Pack materials and supplies	Event-day packing checklist			
		Confirm all vendors and talent	Contact sheet			
		Hold final rehearsals	Rehearsal & Run of show notes			
		Confirm finance controls	Payment and cash-handling plan			
		Prepare emergency backups	Backup supplies and contingency plan			
1-14 days after		Send thank-you notes	Thank-you templates			

Need additional help planning and promoting your event or gala? Schedule a [free 30 consultation](#) and let's explore opportunities to support your success.