

Auction Planning Template



**Your Guide
to a Successful Auction**



LET'S HAVE AN AUCTION!

ACTION STEPS to take when you first decide to hold an auction

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Determine the overall leader who can commit to the entire event and has the necessary skills to manage the process		
Complete <input type="checkbox"/>	Review history of previous event if applicable; talk to past leaders to determine positive as well as negative aspects of the event.		
Complete <input type="checkbox"/>	Determine Committee and sub committee structure and start recruiting		
Complete <input type="checkbox"/>	Begin an Auction Binder and prepare similar binders for committee chairs that contain all pertinent event information (timeline, budget, committee contact information, vendor info, etc.)		
Complete <input type="checkbox"/>	Determine what event software will be utilized for registration, on-site transactions		
Complete <input type="checkbox"/>	Evaluate if an on-line auction could enhance your live event to broaden your base of support for those unable to attend your event.		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

9 TO 12 MONTHS BEFORE YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Check your dates and select the venue. Be sure to check for other large or similar events in your community. Avoid school and religious holidays, major sporting or political events, etc.		
Complete <input type="checkbox"/>	Determine your auction's theme		
Complete <input type="checkbox"/>	Set financial and attendance goals		
Complete <input type="checkbox"/>	Create a budget		
Complete <input type="checkbox"/>	Determine sponsorship levels and benefits		
Complete <input type="checkbox"/>	Determine procurement goals and procedures		
Complete <input type="checkbox"/>	Set Procurement Brainstorming meeting. Empower everyone involved in the auction to tap their personal networks for auction items and ideas.		
Complete <input type="checkbox"/>	Interview and Select Caterer if venue doesn't provide this service		
Complete <input type="checkbox"/>	Interview and select talent (band, disc jockey, etc.)		
Complete <input type="checkbox"/>	Interview and select graphic designer to create all event collateral material (invitations, programs, etc. (Consider seeking in-kind service in exchange for sponsorship recognition.)		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

5 TO 8 MONTHS BEFORE YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Begin Procurement Process. Send procurement letters and emails.		
Complete <input type="checkbox"/>	Procurement Tracking Process: be sure to have a method for tracking procurement either manually or through auction software. If you are having both silent and live auctions make sure to create an easily to understand system.		
Complete <input type="checkbox"/>	Develop invitation list. Be sure to include email addresses if possible for event reminders and promotional emails to build excitement.		
Complete <input type="checkbox"/>	Create and mail Save the Date cards. Also email to promote the event to guests, sponsors and other donors.		
Complete <input type="checkbox"/>	Remember the web! Create a special page and links on your website promoting the event (selling tickets, accepting donations, promoting special items, etc.)		
Complete <input type="checkbox"/>	Develop High Level Event Scenario (including times, room names, beginning and ending of certain auction activities, volunteer schedule, silent auction sections, etc.) to understand the flow of the event. This activity will allow you to also create your program and invitations closer to the event.		
Complete <input type="checkbox"/>	Audio Visual Needs – determine your sound and AV needs including if you will use a PowerPoint presentation, video, etc. during the event.		
Complete <input type="checkbox"/>	Interview and Select Auctioneer		

2 TO 4 MONTHS BEFORE YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Finalize invitation list and mail. Consider an email reminder schedule to invitees as follow-up.		
Complete <input type="checkbox"/>	Escalate procurement! This is the final push.		
Complete <input type="checkbox"/>	Determine Special Appeal (paddle raise) if any at event.		
Complete <input type="checkbox"/>	Determine all Day Of banking, registration and check out procedures.		
Complete <input type="checkbox"/>	Continue Volunteer Recruitment for event		
Complete <input type="checkbox"/>	Create Day Of Volunteer schedule (with shifts) and responsibilities		
Complete <input type="checkbox"/>	Begin program creation (based on items already procured)		
Complete <input type="checkbox"/>	Consider Tasting of Event Menu with Venue (if appropriate)		
Complete <input type="checkbox"/>	Perform Venue Walk Through – meet with catering manager, evaluate timing, flow, special needs of guests		
Complete <input type="checkbox"/>	Promote event – radio, community newspapers, local activities website, TV, church bulletins, etc. (many of these ideas are free to non-profits in exchange for sponsorships for your event. Also work with your “networks” to find connections to enable more promotion of your event.		

3 TO 8 WEEKS BEFORE YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Finish all procurement.		
Complete <input type="checkbox"/>	Put packages together based on themes		
Complete <input type="checkbox"/>	Finalize and print auction catalogue. Also, if possible, put auction catalogue (all or part) on website.		
Complete <input type="checkbox"/>	Assign Items to either Live or Silent Auction		
Complete <input type="checkbox"/>	Begin Printing Bid sheets for silent auction		
Complete <input type="checkbox"/>	Ensure that all certificates and items are secured.		
Complete <input type="checkbox"/>	Begin production of auction signage and display boards		
Complete <input type="checkbox"/>	Begin production of live auction slide show		
Complete <input type="checkbox"/>	Confirm and coordinate printers and computers (if applicable) for auction event.		
Complete <input type="checkbox"/>	Revisit event site and create floor plan. Ensure that guests have ample room to see and bid on items; identify potential problem or choke points.		
Complete <input type="checkbox"/>	Sequence Live Auction items. Make sure that there are NOT too many items; eliminate lesser value items to silent auction.		
Complete <input type="checkbox"/>	Confirm Talent		
Complete <input type="checkbox"/>			

2 WEEKS BEFORE YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Mail or email confirmation letter and auction catalogue (which includes schedule of events) to all confirmed guests		
Complete <input type="checkbox"/>	Complete Live Auction Slide Show or presentation		
Complete <input type="checkbox"/>	Finalize and Confirm Event Volunteers		
Complete <input type="checkbox"/>	Finalize production of auction signage and display boards		
Complete <input type="checkbox"/>	Finalize Printing Bid sheets for silent auction		
Complete <input type="checkbox"/>	Finish all table assignments		
Complete <input type="checkbox"/>	Create or purchase bidder numbers		
Complete <input type="checkbox"/>	Assemble event materials and supplies to deliver to event venue. Create an additional “happy box” to bring with you with one of everything: tape, scissors, paperclips, sharpies, etc.		
Complete <input type="checkbox"/>	Confirm Auctioneer		
Complete <input type="checkbox"/>	Organize all collateral, display and auction items for delivery to venue		
Complete <input type="checkbox"/>	Coordinate delivery of larger items to venue as well as how items will be delivered to winning bidder post event.		
Complete <input type="checkbox"/>			

1 WEEKS BEFORE YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Finalize computers and printers and networking needs for venue		
Complete <input type="checkbox"/>	Conduct training for key volunteers – those handling registration, check out, - anything you feel requires extra or special training.		
Complete <input type="checkbox"/>	Submit final count to caterer or venue. Reconfirm all last minute details		
Complete <input type="checkbox"/>	Finalize event scenario with master of ceremonies and auctioneer		
Complete <input type="checkbox"/>	Print special catalogue for auctioneer with any special instructions		
Complete <input type="checkbox"/>	Print bidder numbers and names for auctioneer to use during live auction. Many people appreciate recognition after they have “won” the bid. This is something you can prepare for your auctioneer to maximize excitement.		
Complete <input type="checkbox"/>	Assign bid numbers to guests		
Complete <input type="checkbox"/>	Compile Guest Packets: a catalogue, bidder numbers, table number and name tag (usually in a large 8 ½ x 11 manilla envelope)		
Complete <input type="checkbox"/>	Create and print addendum for last minute additions - package with catalogue		
Complete <input type="checkbox"/>			
Complete <input type="checkbox"/>			

DAY BEFORE AND DAY OF YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Deliver all auction items and event materials to the venue		
Complete <input type="checkbox"/>	Complete event day set up		
Complete <input type="checkbox"/>	Train volunteers (who weren't previously trained)		
Complete <input type="checkbox"/>	Test all Audio/Visual equipment		
Complete <input type="checkbox"/>	Print all final guest lists and any other reports necessary for event.		
Complete <input type="checkbox"/>	Stay Calm		
Complete <input type="checkbox"/>	Talk to all Volunteer Leads to ensure everyone is ready to go!		
Complete <input type="checkbox"/>	Have fun and raise lots of money!		

AFTER YOUR AUCTION

Start Date:	Completion Date:
Key People & Resources	

	ACTION ITEM	TARGET DATE	NOTES
Complete <input type="checkbox"/>	Reconcile all money transactions. Confirm that all cash, checks and credit cards payments match with the winning bidder numbers for both live and silent auctions and other donations.		
Complete <input type="checkbox"/>	Reconcile event expenses and revenues to determine your net results.		
Complete <input type="checkbox"/>	Thank and recognize volunteers – either with hand written letters or a post event gathering. Don't forget – they are your best asset!		
Complete <input type="checkbox"/>	Thanks sponsors and other donors.		
Complete <input type="checkbox"/>	Schedule and hold post event evaluation meeting with committee.		
Complete <input type="checkbox"/>	Update all information in event binder.		
Complete <input type="checkbox"/>	Determine next year's leadership. Pass binder onto new leadership.		
Complete <input type="checkbox"/>	Set a date for next year's event.		
Complete <input type="checkbox"/>	Celebrate your success and remember to have an action plan for those areas that need improvement!		