# EVENT PLANNING FORM

UW COMBINED **Fund** Drive — SINCE 1984

| | Activity | Date Due | Date Completed | Notes |
|---|---|---|---|---|
| **PURPOSE OF EVENT** *(fundraiser, awareness, education, team building, etc.)* | | | | |
| **Approval**<br><br>Campaign assistant notification<br><br>Leadership approval | | | | |
| **Attendance**<br><br>Expected attendance<br><br>Guest list<br><br>Name tags | | | | |
| **Venue**<br><br>Name of Venue<br><br>Reservation | | | | |
| **Time** | | | | |
| **Refreshments**<br><br>Food form<br><br>Department budget | | | | |

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|---|---|---|---|---|
| **Materials**<br><br>☐ Charity guides<br><br>☐ Giving forms<br><br>☐ Charity brochures<br><br>☐ Credit card form<br><br>☐ Benefits of giving<br><br>☐ Top Ten Reasons | | | | |
| **Giveaways/door prizes** | | | | |
| **Advertising/communication**<br><br>☐ Email<br><br>☐ Email from leadership<br><br>☐ Flyer<br><br>☐ Logo<br><br>☐ Intranet<br><br>☐ Campus-wide (UWCFD website, coordinator bulletin, *UW Insider)* | | | | |

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|  | Activity | Date Due | Date Completed | Notes |
|---|---|---|---|---|
| **Charity speaker**<br><br>Charity name<br><br>Charity contact<br><br>Reservation form |  |  |  |  |
| **Equipment needed**<br><br>☐ Laptop<br><br>☐ Internet<br><br>☐ PowerPoint<br><br>☐ DVD<br><br>☐ Projector<br><br>☐ Microphone<br><br>☐ Tables<br><br>☐ Chairs<br><br>☐ Cash box |  |  |  |  |

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|  | Activity | Date Due | Date Completed | Notes |
|---|---|---|---|---|
| **Cash handling** |  |  |  |  |
| Money counted (two people) |  |  |  |  |
| Credit card tool |  |  |  |  |
| Giving forms |  |  |  |  |
| Money order |  |  |  |  |
| Fundraiser form |  |  |  |  |
| Submit form/money order to campaign assistant |  |  |  |  |

# EVENT PLANNING FORM

|  | Activity | Date Due | Date Completed | Notes |
|---|---|---|---|---|
| **Project completion/closure**<br><br>Complete final accounting and reimbursement activities<br><br>Thank leadership, financial sponsors, volunteers, and participants<br><br>Report results to management and staff<br><br>Evaluate the project formally or informally<br><br>Make notes for next year's planning with suggestions for improvement<br><br>Record activities and names of participants for future reference |  |  |  |  |