



## Auction Checklist

*Use the following checklist for all auction formats:*

### Logistics:

- ☐ Decide on your auction format (live vs. online vs. hybrid).
- ☐ Decide on an auction date.
- ☐ Create a detailed budget with your team.
- ☐ Define specific fundraising goals.
- ☐ Check if your organization must secure a permit for any raffles or selling of alcohol.
- ☐ Familiarize yourself with the tax rules on auction donations for your region.
- ☐ Decide if entry is free or will require tickets.

### Items:

- ☐ Create a wish list of at least 15 mission-aligned items and experiences.
- ☐ Reach out to potential item donors (board members, major donors, businesses, etc.).
- ☐ Write item descriptions.
- ☐ Set item start bids and increments.
- ☐ Set Buy-Now prices if offering Buy-Now options.
- ☐ Research the Fair Market Value of items if not provided by donors.
- ☐ Coordinate item shipping/pick-up for winning bidders.
- ☐ Schedule item pickup times if applicable.

### Team:

- ☐ Create roles for your event team (item procurement lead, marketing lead, checkout coordinator, etc.)
- ☐ Assign roles to staff and volunteers.



# CharityAuctions

## Sponsors:

- ☐ Create at least 3 sponsorship tiers with benefits.
- ☐ Reach out to at least 10 potential sponsors 3-4 months before the event.
- ☐ Add sponsor logos to event materials.
- ☐ Create sponsor recognition posts on social media.

## Communications:

- ☐ Create an auction promotion timeline for social media, email, etc.
- ☐ Design consistent branding for your event.
- ☐ Reach out to promotional partners like influencers and local news.
- ☐ Prepare thank you emails and letters.

## Software:

- ☐ Choose the auction software or fundraising software that best fits your needs.
- ☐ Configure your auction page.
- ☐ Photograph items for your online auction page and upload items.
- ☐ Set bidding windows for online auctions.
- ☐ Design a digital event banner for your auction page.
- ☐ Test your auction page.
- ☐ Configure payment processing and online ticketing.
- ☐ Configure receipts.

Using mobile bidding? Download our Mobile Bidding Checklist at  
[blog.charityauctions.com/mobile-bidding-checklist/](http://blog.charityauctions.com/mobile-bidding-checklist/)



# CharityAuctions

*Use the following checklist for in-person auctions:*

## **Program:**

- ☐ Decide what activities to include in your event (dinner, paddle raise, guest speeches, volunteer awards, etc.).
- ☐ Create an event timeline.
- ☐ Print event programs or print signage displaying your schedule.
- ☐ Create an impact video.
- ☐ Coordinate with guest speakers.
- ☐ Send formal invitations if applicable.

## **Volunteers:**

- ☐ Recruit volunteers.
- ☐ Prepare volunteer materials (T-shirts, water bottles, name tags, etc.).
- ☐ Teach volunteers how bidding works.
- ☐ For live auctions, teach volunteers how to assist the auctioneer with spotting bids.

## **Venue:**

- ☐ Compare at least 3 potential venues for costs, capacity, amenities, etc.
- ☐ Book your venue.
- ☐ Create your floor plan.
- ☐ Arrange catering services.
- ☐ Coordinate bathroom amenities if not provided by your venue.
- ☐ Secure tables and chairs (include enough tables to display items as well).
- ☐ Coordinate your check-in process.
- ☐ Coordinate your check-out process.
- ☐ Create a music playlist or book a DJ.
- ☐ Assign a volunteer as photographer or book a photographer.



## Payments

- ☐ If applicable, configure credit card readers.
- ☐ If accepting cash donations, set up cash boxes and payment record keeping.

## Technology:

- ☐ Secure A/V equipment, including speakers, microphones, and projectors.
- ☐ Set up wi-fi for your event. Check with your venue or rent networking equipment/mobile hotspots.
- ☐ Create a back-up plan if wi-fi fails.
- ☐ Test that all equipment is functioning before event day (wi-fi, projectors, cameras, etc.)
- ☐ Bring devices for day-of auction management.

## Signage:

- ☐ Create a welcome sign.
- ☐ Create a sign with bidding instructions.
- ☐ Print item signage with QR codes and item descriptions.
- ☐ Secure sign holders.
- ☐ Print bidding paddles if applicable.
- ☐ Print bidding sheets if applicable.

## Auctioneer:

- ☐ Book your auctioneer.
- ☐ Brief your auctioneer with your organization's mission, the event program, and all item details.