

Fundraising Checklist

A phase-by-phase checklist from first meeting to final thank-you — for schools, nonprofits, churches, and sports teams.

Use this checklist from first meeting to final thank-you. Check items off as you go — print extra copies for your lead team.

4+ Weeks Out — Foundation

Lock the basics before you ask anyone for money or time.

- ☐ Write a one-sentence mission for this campaign (who benefits and why now)
- ☐ Set a specific dollar goal and hard end date
- ☐ Pick one primary fundraiser format (event, sale, pledge drive, or appeal)
- ☐ Confirm approvals: school admin, church board, league commissioner, or city permit if needed
- ☐ Open a dedicated bank account or sub-ledger so funds stay traceable
- ☐ Draft a simple budget: expected revenue, supplies, venue, insurance, processing fees
- ☐ Name a lead coordinator plus at least two backup contacts
- ☐ Create roles list: treasurer, communications, volunteer captain, day-of lead

2 Weeks Out — Build Momentum

Turn plans into visible progress your community can join.

- ☐ Publish a signup form for shifts, donations-in-kind, and booth assignments
- ☐ Recruit your first 5 volunteers and confirm they received role details
- ☐ Secure venue, equipment rentals, and any food handler requirements
- ☐ Collect in-kind donations (prizes, supplies, printing) with written thank-you notes
- ☐ Design one hero graphic and one short paragraph supporters can copy-paste
- ☐ Schedule three promotion waves: announce, remind, last call
- ☐ Brief speakers or emcees on the goal and how to give
- ☐ Test payment links, QR codes, and cash-handling procedures

1 Week Out — Final Prep

Remove surprises so volunteers show up confident.

- ☐ Send a personal reminder to every signed-up volunteer
- ☐ Print run-of-show, contact sheet, and emergency numbers
- ☐ Pack a day-of kit: tape, pens, cash box, receipts, first-aid basics, chargers
- ☐ Assign setup and teardown crews with start/end times
- ☐ Walk the venue: parking, restrooms, accessibility, rain backup
- ☐ Confirm quantities for food, merch, or materials — avoid last-minute shortages
- ☐ Place signage and directional arrows if you expect foot traffic
- ☐ Do a 10-minute team huddle plan: who opens, who closes, who counts money

Event Week — Execute

Stay calm, track numbers, and protect your volunteers.

- ☐ Arrive early for setup; take photos for social proof (with permission)
- ☐ Greet volunteers by name and point them to their station
- ☐ Track income at least twice during the event (cash + digital)
- ☐ Keep a running log of expenses paid on the spot
- ☐ Capture donor and volunteer emails for thank-yous (paper sheet or tablet)
- ☐ Handle issues through the lead only — avoid conflicting instructions
- ☐ Announce progress toward goal mid-event to energize the room
- ☐ Close stations on time; secure cash and inventory before teardown

Within 48 Hours — Close Strong

How you finish determines whether people give again next year.

- ☐ Reconcile all revenue against your budget spreadsheet
- ☐ Thank every volunteer by name (text, email, or handwritten note)
- ☐ Thank donors and sponsors within 48 hours with amount raised and impact
- ☐ Post a public results update: goal, total, and what happens next
- ☐ Return borrowed items and settle outstanding invoices
- ☐ Hold a 20-minute debrief: what worked, what to drop, what to repeat
- ☐ Archive photos, signup data, and receipts in one shared folder
- ☐ Schedule next year's date on the calendar while energy is high

Organize volunteers in minutes. Create a free signup form at www.signupkit.co — assign shifts, track donations-in-kind, and send reminders automatically.