



The 7 Steps to a Successful Benefit Auction



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The First Step on the Path to Calmness

Select a chairperson or leader who has strong leadership and organizational skills and is able to commit to the entire event process.

Talk with previous leader(s) for feedback on what worked well and what did not—incorporate those findings into your plan.

Review the previous year's event history and resources, including budget and revenue, donor sales, sponsorship records, and operations.

Create an auction planning binder* for the current year, containing key event information, such as budgets, vendor information, contracts, invoices, floor plans, contacts, collateral material, and more.

Form a steering committee and sub-committees.

Establish your event budget and set attendance and revenue goals

Consider adding online elements to enhance your live event, such as online registration, publish a pre-show online catalog, and host an online pre-auction using fundraising technology solutions.

Select a date, venue, and auctioneer. Consider space needs, availability, parking, community calendars, and in-demand dates such as holidays and major sporting events.

***Planning Binder**

The planning binder is crucial to the event planning process. It contains all pertinent event information, such as budgets, vendors, contracts, invoices, floor plans, collateral material, etc. Use this binder during the current year planning cycle and as a history and reference point for the next event.



The Second Step on the Path to Calmness

Establish firm procurement goals and deadlines. Identify the best-selling items from previous events and include those in your goals.

Schedule a procurement meeting with committee members to brainstorm and generate ideas about hot items to target.

Encourage procurement volunteers to explore their personal networks for possible donations and sponsors*.

Identify sponsorship opportunities and benefits.

Consider hiring a graphic designer to create the event promotional materials—especially the invitation and website design.

Review and update your donor, sponsor, and procurement contributor lists, including email and postal addresses and phone numbers.

Create Web pages promoting the auction. Set up registration and donation pages to sell tickets, accept donations, leave live/silent auction bids, and securely accept credit card payments online.

Add an item donation link to your website.

Identify potential speakers and individuals to recognize during the program. Consider recruiting an emcee for the evening. Start recruiting those speakers and reaching out to those you wish to recognize at the event to confirm their availability.

***TIP:** Give procurement volunteers specific goals so they can focus their efforts. Make sure procurement volunteers have plenty of procurement forms, so they can solicit donations spontaneously. Give them an electronic version as well—to email multiple contacts at once. Also consider adding a “Donate Items” link to your website and any email correspondence.



The Third Step on the Path to Calmness

Send procurement letters and emails.

Create and send "Save the Date" cards and email to promote the event to donors, patrons, and guests.

Begin tracking procurement, sponsorship, and guest information manually or with your technology provider.

Formulate a timeline, also known as the Run of the Show, for the day prior to and day of your event. Remember to include a time slot for your Special Appeal/Paddles Up and other specific agenda items such as Heads or Tails.

Develop an invitation list including email addresses when possible.

Hire a professional sound and lighting company to ensure proper sound and light equipment for your event. Many venues are not optimally equipped for an auction event. Provide a stage monitor speaker for the Auctioneer

Confirm availability of program speakers and honorees.

Decide if consignment travel and experience packages are going to be offered and determine which ones would appeal to your donors.

Identify the Special Appeal and develop a series of email campaigns to engage potential attendees and sponsors in your cause or project. (New buses, bleachers, better security etc...)

Review procurement results and compare currently procured items and your potential revenue to your goal so you have lead time to escalate procurement efforts and outreach.

Make sure you have a space prepared to catalog and secure auction items. (Church vs. homes)

***TIP:** Incorporate ways for guests to donate even if they cannot attend. All event materials and invitations should include a website address for direct donation as well as online registration.



The Fourth Step on the Path to Calmness

Define event banking procedures.

Finalize invitation list and mail invitations.

Insure venues WiFi services are working properly with the online check out system and credit card terminals.

Recruit volunteers for the day before the auction and auction night activities. Create a volunteer contact list.

Outline registration and checkout procedures.

Perform a site walk-through with the venue's catering manager—consider the floor plan, food, timing, flow, and special needs. Identify space where volunteers can safely store their personal items and take a scheduled break.

Package* items together to create one-of-a-kind offerings.

Create an online auction website and begin a series of email campaigns to engage constituents.

*** Packaging Tip**

Package related items together to create a one-of-a-kind offering. For example, a group of gift certificates for services at a salon can be grouped as a "Day of Beauty." This is also a good way to utilize "orphaned" or "odd lot" items and differentiate your event.



The Fifth Step on the Path to Calmness

Email a preliminary catalog or teaser information about selected auction items to existing patrons in your database to generate excitement.

Finish procurement. Enter final items into event planning software. Procurement should be completed one month prior to the auction to allow adequate time to print and distribute the catalog, as well as prepare display boards and signage.

Inventory auction items and certificates you've already collected and actively collect the items and certificates not in your possession.

If using computers and printers at the event, coordinate computer equipment and on-site technical support.

Create the PowerPoint slide show for each item in the live auction with details.

Finalize the online auction website and prepare to launch.

Create a floor plan with the venue or caterer—identify traffic flow and possible pinch points.

Finalize the event program.

Create program material, speeches, and emcee remarks, and send to speakers so they can prepare for a rehearsal.

Schedule a mandatory program rehearsal before the auction with volunteers, auctioneer, and emcee.

Produce display boards* for silent auction items.

***TIP:** Display silent auction items in creative ways to generate excitement. For example: set up a bowl with tropical fish surrounded by sand to promote a beach package to Hawaii.



The Sixth Step on the Path to Calmness

Assign items to live and silent auction sections.

Sequence the live auction items*.

Finalize and print the auction catalog. Conduct a planning call with your auctioneer prior to finalizing the catalog—he might see some issues with the item sequence or the items themselves that you may not have spotted. (highly recommended!)

Assemble event materials and supplies to deliver to the venue.

Conduct a rehearsal with your speakers to ensure they are comfortable with their material.

Give a script to your registration volunteers, so that they can effectively explain the process to guests.

Finalize program script and set up a dress rehearsal at the venue the day of the event.

Create a day-of-event volunteer responsibilities list and schedule—send to volunteers so they can be prepared. Follow up with calls to all volunteers to ensure they have received the information and are still committed.

Organize all auction items and displays for delivery to venue.

Create directional or promotional signage.

Verify certificates. Create certificates if none are given with item. Put them in chronological order by package number in a separate file.

***TIP:** The order in which items are sold during the live auction can often be as important as the items themselves. Placing items in a specific sequence can increase auction revenue.



The Seventh Step on the Path to Calmness

If using technology software at check-in and checkout, finalize arrangements for computer and printer set-up and networking.

Prepare detailed catalog for auctioneer.

Provide caterer or hotel with final guest count for meals.

Receive delivery of credit card readers or terminals. Check to ensure that your equipment order is complete and test the equipment.

Hold a meeting to train volunteers; communicate expectations, timelines, and schedules.

Create an addendum to the catalog for last-minute items.

Print bid sheets unless using touch screen bidding terminals or smartphone bidding technology.

Assign guests to tables.

Assign bidder numbers to guests*.

Finalize bidder packets, which usually include a catalog, bidder number, and table number.

Create walk-up registration packets.

Make sure all auction packages have their package number assigned and attached.

Enter last minute registrations three days prior to the auction.

***TIP:** Accurate bidder numbers are key to a smooth event. All registered guests should be assigned a bidder number 24–48 hours prior to the event.



The Last Step on the Path to Calmness

Print addendum to the catalog, if necessary.

Print registration lists and all reports pertinent to the event.

Print final day-of-event schedule and distribute to event staff and volunteers.

Deliver all items and event materials to venue.

Print out package list for verification of packages.

Print out placard signage for each item, if necessary.

Match up each package with bid sheet.

The day of the event, conduct a program dress rehearsal at the event venue if possible.

The day of the event, complete on-site auction set up.

Several hours prior to the event start, hold a brief “all-hands” meeting for volunteers and staff to review event night roles and responsibilities and answer any last-minute questions.

Encourage check-in volunteers to review the script they received earlier in the week describing their assignments along with the rules/instructions for any games being offered such as Heads or Tails and/or raffles.

TIP: Provide a meal for volunteers and staff prior to the event—use the time to thank your volunteers and answer last-minute questions. Ask registration and checkout volunteers to not take open beverages to their stations, since they may spill onto electrical equipment.



The Grand Finale

Post all check and cash payments into event planning software.

Reconcile amounts due prior to submitting credit charges to the bank*.

Submit charges to the bank. Resubmit declines—banks sometimes require an approval code before confirming a charge.

Data backup and archive.

Finalize date for next year's event.

Thank-you letters to sponsors, donors, and guests. Include next year's event date in the letter.

Reconcile budget, expenses and revenue to determine event results.

Update auction contact list.

Acknowledgements for volunteers (thank-you cards or a gathering).

Hold a post-event party and debriefing with volunteers and staff.

Update event binder for next year which will insure a smooth transition for next Auction Chair.

Evaluate success of online auction—schedule another for a few months out. If you have items from the event that did not sell, consider having a post-event online auction to sell them.

Order and pay for consignment packages within 7 days of your event, if applicable.

Arrange for shipment or delivery of items that were not picked up the night of the event.

Provide a senior staff member with a detailed log of the issues that came up at the event. She can then personally contact guests who require special handling. This extra touch may salvage some very important donor relationships.

Schedule a volunteer debrief to discuss the event and any improvements needed, if any.

***Bank Reconciliation** - After the event, verify that all cash, check, and credit card payments correspond with the winning bids for the live and silent auctions and any other donations made at the event.