

## Virtual and Hybrid Fundraising Event Checklist

In the world of virtual and hybrid events, it is more important than ever to engage your attendees in the cause your mission serves. Otherwise, your event becomes just another webinar, meeting, or outing. As you plan the concept for your event, consider the following questions:

- How does every element of the event tie into the mission so that attendees come away with a better understanding?
- What is the “fun” in the event? What will be entertaining, inspiring, feel-good, tear-jerking, etc.?
- What is the “fund” in the event? What are the multiple ways that a donor can give before, during, and after the event?
- How will mission ambassadors and volunteers be involved? How will they be prepared to tell the stories of the cause and the impact the organization has?



### Before the Event

- Set SMART goals: specific, measurable, attainable, relevant, and time-bound. Here are a few samples:
  - Leverage new “virtual partner” sponsorship opportunities at \$500 to \$5,000 levels to increase event sponsor revenue before X date.
  - Increase board engagement target – 80% of members participate in one or more virtual or remote event-related fundraising activities before X date.
- Determine which virtual and remote event type is best for your audience and sponsors.
  - **100% Live (synchronous)** – Ideal for events under 30 minutes, campaign updates, raffle winner announcements, game night, and/or activities that require attendee participation.
  - **Live and Recorded (hybrid)** – Great for virtual programs scheduled to run 45 minutes or longer. Great fit for organizations with a long history of popular in-person events.

- **100% Recorded (asynchronous)** – A smart choice for nonprofits working to connect with an entire community. Without interactive features to keep attendees engaged, be sure your case for support is compelling and call to action clear.
- **Participant-Driven** – A safe solution for historically popular races or community clean-up days. New to social media? This is a great time to start. Seasoned Pro? Use this opportunity to test a new platform.
- **Remote Drive-Up/Drive-Thru** – Possible in rural and suburban areas with a car culture. A great fit for organizations with missions that can be portrayed visually.

Begin promoting your event.

- **Platform**

- Choose a virtual events platform and test it. Determine who will manage the software as a “producer/virtual event manager.” Schedule a time (or mini-event) to serve as a “run through.” Use a spreadsheet to plan out how you will use the software:

SOFTWARE	COST	SETUP	PURPOSE	PERSON RESPONSIBLE	NOTES
Main Platform: Zoom, Webex, Twitch, etc.					
Additional Social Platform(s)					
Facebook Live, LinkedIn Live, Instagram TV, etc.					
Special Purpose Platform(s): Auction, etc.					
Donation Platform(s): QR Codes for Online Giving					
Other					

- Develop the event schedule (timeline) for the evening and check the sunset schedule, if a drive-thru/up event.
- Recruit any speakers.
- Determine a physical site location to serve as the main hub.
- If it's a drive-thru/up event, identify the route and key impact stories for signage along the route. Create a physical program with the route, any sponsor logos, additional impact stories, and the ways to give, including Donate Now links and QR Codes to your Network for Good everyday giving page.
- Confirm if you will have a pre-event gathering for sponsors, speakers, or other VIPs. For example, you may want to host a pre-event just for sponsors and board members.

### • Logistics

- Create a theme and branded design (logo, etc.) for the event.
  - Will you encourage special dress? For example, "formal from the waist up"
- Ticket and form options to help you track fundraising types:
  - An event ticketing page for individual tickets with a monetary value
  - Consider adding "pay it forward" tickets at the lowest price for those who cannot attend but want to support your cause.
  - Determine whether you will offer a discounted "early bird" ticket.
  - A second event ticketing page for sponsorships (This could be merged with the first or kept separate. Having two makes it easier to set up filters and communicate with individual ticket buyers and sponsors differently.)
  - If you are offering complimentary tickets (i.e. for sponsors who receive multiple tickets), you may want to add a question to the event page.
  - A dedicated everyday giving page for day-of donations
- Identify ticket levels and benefits
  - Will attendees receive any special items (food, etc.) for ticket purchases? What are the benefits of a high dollar ticket purchase?
  - When the form for the donation comes up, use a custom question or two to collect attendee preferences. For example, inquire about their favorite party song and have the DJ select a few (or all) to play during the gala.
- Define volunteer roles, develop position descriptions, and include estimated time commitments for each opportunity.



## • Promotion

- Create a custom filter in your Network for Good fundraising software to create a prospect list for the event including anyone who has not yet purchased a ticket to the event. On the left-hand side, choose “purchased tickets to event,” in the middle “not equal to,” and on the right, choose your individual event ticketing page from the drop-down list.
- Promote the event across at least one communication channel (email, text, direct mail, Facebook, YouTube, your website) EVERY day until the event.
- Determine whether to send a print invitation or special email (i.e. Paperless Post) to top and mid-level donors.
- Identify other areas where your event can be promoted: connections, board outreach, etc.

## • Fundraising

- Will there be a silent auction? If so, begin collecting items.
  - Task your board with getting/providing at least two items.
  - Partner with small businesses to donate virtual experiences (i.e. online demonstration of simple/common bike repair from a local bike repair shop or cocktail lesson from a local high-end restaurant’s bartender).
  - Select your silent auction software—check out Capterra for virtual auction software recommendations and reviews. (Note that Network for Good does not endorse or integrate with any silent auction software. You can always export data from a different system and import the details into your Network for Good system.)
- Will there be sponsorship options?
  - Create levels and benefits.
    - Identify how sponsors will be promoted—on the event webpage (if there is one), on a PowerPoint slide at the beginning and end of your webinar, a background (step and repeat) during the spoken program of your event, on a list of sponsors at bottom of event and attendee communications, signage along the driving route, etc.
  - Create a ticketing page for sponsorships. If only a few sponsorships are available, add them to the ticket donation page.
  - Begin soliciting all business and major gift prospects. Use your fundraising software to keep track of businesses and major gift prospects you have reached out to using custom fields and tasks.
  - If holding a silent auction, secure auction items.
    - Determine how you will transport items to winners.

## Three Weeks Before the Event

- Continue regular promotion of your event and sponsors.
  - Create a media plan and begin outreach for the event.
  - Determine whether you will purchase social media advertising (Facebook, Instagram, etc.).
  - Ask your board and volunteers to promote the event among their network. Draft a paragraph for them to use to promote via email and a short social media post. Be sure to include links to your event and/or ticketing page
- Continue securing sponsorships.
- If desired, secure a match gift donor to leverage during the event. Set up a dedicated everyday giving page to take donations during the event and brand with similar graphics to your event ticketing page. Consider adding a specific goal so that visitors to the page can see how you are tracking towards your goal. If you have a match, make sure you mention it on this page.
- Draft spoken program and share talking points/script with presenters.
- If a drive-thru/up event, send all signage with impact stories and programs to printer.
- Consider how you will thank key volunteers—perhaps a small token of appreciation?

## 48 Hours Prior to Event

- Hold a “Dress Rehearsal” with all speakers using the devices and internet connection they plan to use for the event or with all speakers using audio equipment for the drive-thru/up event.
  - Ensure all presenters are on point with your theme (dress, comments, etc.).
  - Double-check that you have received all of your sponsor logos and have updated all of your materials accordingly.
  - Double-check the links and QR Codes for your everyday giving page.
- Finalize:
  - Follow-up communications—draft email and have ready to insert pictures. Prepare copy for social media posts, etc.
  - Create a post-event attendee survey and schedule to send the day after the event.
  - Send out joining instructions to all ticket buyers, complimentary guests, and sponsors with information about how to join the event online. Let them know who to contact if they have any technical questions. Encourage them to test the link in advance to ensure their computer, tablet, or smartphone is ready to use the relevant platform, and to log in a few minutes before the event is due to begin.
  - If a drive-thru/up event, send out reminders with the starting route and event details.
  - Draft text messages to go out during the event promoting the link to your everyday giving page.

## Day of the Event

- Start the day strong. Schedule a “first-thing” meeting with your team and key volunteers to identify and troubleshoot all last-minute items.
- Check all essential devices are fully charged and connected to the internet. Confirm back-up tools are charged, visible, and within quick reach.
- Execute event and spoken program.
  - Thank attendees, donors, board, and key volunteers.
  - Tell a brief story—preferably by the person affected (service recipient, board member, etc.).
  - Make a pitch for contributions.
    - Send text messages in real-time or have pre-scheduled texts go out.
    - If you have a matching gift, promote throughout and share progress.
    - Have audience seeded with a few people who can type in chat “I just donated!” to encourage group giving.
- Open the route for the drive-thru/up event.
  - Greet attendees and renew your relationships with donors.
  - Keep a running list of stories to tell attendees about how the event is going.
  - Let attendees know where and how they can donate during the event. Plan to send text messages in real-time.
- Have fun! This event could be the only time your guests focus on your mission each year. At this point, you have done ALL you can to deliver a wonderful experience. Smile and celebrate all that you have accomplished thus far!

## After the Event

- Send attendee segment-specific thank you communications (emails, newsletters, social updates, video, text, infographics, etc.). Communicate via segments – board members, new donors, loyal donors, volunteers, sponsors. After communications are sent, assign follow-up tasks to board members for continued one-on-one engagement (phone call) with major gift donors/sponsors/prospects within the next three weeks. Create segmented lists in your Network for Good software so board members know who they should follow up with. Encourage them to store notes on their conversations on the donor record.
  - Send a simple survey to capture attendee feedback and send it via digital communications.
  - Deliver auction items as needed.

- Schedule a virtual debrief meeting with your board and key volunteers to review attendee survey findings, capture feedback, and finalize the next steps. Ask:
  - What worked?
  - What would you do differently?
  - If you could only change one thing, what would it be?
  - What could be done to increase giving before, during, and after the event?
  
- Use giving filters in your fundraising software to determine:
  - Gross vs. net proceeds
  - # of new donors and \$ revenue
  - # of sponsorships and \$ revenue
  - # of registrants
  - # of attendees
  - # of VIPs and/or major gift prospects
  
- Ready for a repeat? It's never too early to start planning. Confirm the date and time for next year!

Log in to your Network for Good fundraising software to get started planning your next event!

