

# Virtual Grassroots Fundraising Event Checklist

## Pre-Event Planning

- ☐ Determine the **event goal** (educational, entertaining, social, advocacy, or something else) and the **topic or activity** (see the Virtual Grassroots Fundraising and Engagement Strategies Guide for examples)
- ☐ Appoint an **event chair and/or a committee**
- ☐ Decide who your **target audience** will be for the event and how you will invite them
- ☐ Decide if and how you will use the **Zoom Philanthropy Speakers Tour Group**
- ☐ Determine **how you will fundraise** (required donation, suggested donation, an “ask” during the event, an auction, use the Speakers Tour Group, and more!)
- ☐ Determine **who will be assigned to make the “ask”**. It could be a speaker from the Speakers Tour Group, a Region President or another powerful speaker in your group
- ☐ Work with your Grassroots Engagement Professional to **create your event webpage** (also known as Ticket/Donation pages)
- ☐ **Set up the Zoom event** and share the log-in information *after* attendees have registered and made their donations
- ☐ **Secure your host or co-hosts** to serve as event facilitators/moderators; confirm other speakers as needed
- ☐ **Create an event agenda and script** for the event facilitators and speakers; see the Virtual Grassroots Fundraising and Engagement Strategies Guide for talking points regarding HMO and its needs
- ☐ Find creative ways to **engage your audience** – ask for questions ahead of time and during the event; know your audience so you may supply an informational piece; and more!
  - Will participants be muted or unmuted? Decide before the event on how you will handle participants coming into the session. Mute everyone as they come in or choose to unmute until you have started.
- ☐ How will you incorporate a **Hadassah Moment**, to tie the event back to the organizational mission and help tee up the “ask”?
- ☐ Decide on your **event follow-up plan and timeline** before the event, including how you will thank participants/donors, will the follow up email include a link for making a gift, how will you share what the next opportunity is?

## During Event

- ☐ **Stay on time** with your event agenda and script. Your moderator or facilitator should make this possible
- ☐ Direct participants to the **Zoom chat box** to ask questions and share thoughts throughout the event; **assign someone to monitor the chat box** and read any questions aloud to the speakers
- ☐ **Ensure the “ask” is made** in addition to sharing how to stay engaged

## Post-Event

- ☐ **Send out pre-written thank you emails** to participants with dates and information on how to stay involved (see the Virtual Grassroots Fundraising and Engagement Strategies Guide for a sample thank you email)
- ☐ **Send your attendee data** to your Grassroots Engagement Professional or Managing Director

## **Breakout Activity #1: Putting It All Together**

Use this worksheet as a guide for your event planning breakout room discussion.

<b><u>Planning Step</u></b>	<b><u>Notes</u></b>
<b>Event Goal</b>	
<b>Event Type/Activity/Topic</b>	
<b>Target Audience</b>	
<b>How will you invite them?</b>	
<b>Fundraising Opportunities</b>	
<b>Zoom Philanthropy Speakers Bureau</b>	Y/N If yes, what role will they play?  If no, who will your speakers be?  Who will moderate the event?
<b>Hadassah Moment</b>	
<b>Who will make the ask?</b>	
<b>How will you engage the audience throughout the program? Which Zoom features will you use?</b>	
<b>Who is responsible for writing and sending the thank you email?</b>	
<b>Who will stay in touch with your Grassroots Engagement Professional throughout the process?</b>	
<b>Additional Notes</b>	