

Virtual Events —
PTA and School
Fundraising
Resource Guide

Table of Contents

03 About Pledge

04 Benefits of Virtual Fundraising

05 Before You Get Started

06 Pre-Event Planning

14 Engagement Plan/Comms

17 During Event

22 Run of Show

25 Post-Event

28 Case Studies

31 Glossary

33 Timeline



ABOUT PLEDGE: Pledge is an award-winning fundraising platform that makes it easy for businesses, nonprofits and individuals to make a positive impact in their communities and around the globe. With Pledge, every Zoom call, Clubhouse chat, Shopify store, and virtual event can become a fundraising opportunity and demonstrate real-time impact. Pledge powers donations through leading online platforms, such as Zoom, Evite, Shopify, and Legacy.com, as well as other major brands like Discovery, Cost Plus World Market, Snap and Bird. It processes donations to over two million verified nonprofits and charitable organizations of all sizes, from local to global reach and is a proud member of the UN Global Compact, Pledge 1%, Conscious Capitalism, and PledgeLA. Interested in making a difference? Visit <https://www.pledge.to> and make your #PledgeToDoGood.

Benefits of Virtual Fundraising

This past year, schools and PTAs have pivoted and innovated teaching strategies to best fit the needs of students. Fundraising strategies are no different. Schools have shifted in person galas to virtual events and moved school events like choir performances online. There are many benefits to virtual events, and when the world is able to come together in-person again, many schools will promote a hybrid option of events, allowing grandparents in a different state to still tune in and support the school. Benefits of virtual events include:

Larger Reach

Expand your event capacity and reach to anyone with internet access including out of state and international grandparents, relatives and alumni.

Simpler Logistics & Cost-Effective

The overall upfront investment is significantly lower than a physical event.

Technology

Take advantage of integrated tools like live leaderboards, donor scrolls, campaign updates, virtual donation overlays, and videos to engage with your audience at all stages of the event and make attendees feel connected.

Longer Campaigns

Virtual fundraising can begin well before the actual event and last beyond the live event date.

Better Data and Reporting

Online donations are a seamless way to ensure all funds are received without delay and entered into your database.

- A thank you and tax receipt are automatically sent to the donor, allowing your school to focus on your mission.
- The data provided through modern analytics in a virtual event is invaluable to better understand what is working or not working to yield the highest donations.

Before You Get Started

Virtual fundraising allows you to **connect with your community** wherever they are and whenever they can using online fundraising tools.

Virtual fundraising is not high-tech. It simply means that donor events, engagement, conversations, and education **happen online rather than in-person.**

Pre-Event Planning

Planning a virtual fundraiser is similar to planning many other events. It's imperative to start with clear fundraising goals and identify the best event to reach those goals and engage your supporters. Then it comes down to the details and preparing thoughtfully. Create an overall event plan that includes everything from the timeline and the team to the technology and the call to action. We have provided a detailed pre-event planning checklist to help get you started.

Checklist

- Determine virtual event team and schedule weekly meetings with the event team (staff, board, event planner, vendors, etc.).
- Set fundraising and event goals.
- Establish a budget.
- Select virtual event format, length of time, and appropriate video platform.
- Select fundraising platform and tools.
- Event production (internal and/or external).
- Confirm any special guests (hosts, emcee, celebrity/influencer, etc.).
- Engage major gift donors before the event.
- Attendee / guest outreach strategy (invitations, gifts, other).
- Enlist board members in fundraising, marketing, and sponsors.
- Develop sponsorship options and recruit sponsors.
- Develop marketing / social media plan.
- Determine fundraising plan during the event (auction, raffle, text to donate, etc.).

Tips:

- Create a destination page, including clear information about the virtual event and where supporters can fundraise, donate, and interact with one another.
- Develop a clear and consistent communication strategy that drives traffic to your campaign page.
- Highlight and promote the fact that your event is virtual.
- Add a video to raise awareness and increase engagement.
- For fundraisers, make sure you promote your goal, update progress, and announce milestones to keep your supporters motivated.
- Keep the momentum going by engaging on social media.

Pre-Event Planning Guidelines:

- 01 Establish Clear Goals.
- 02 Define your Target Audience.
- 03 Choose your Virtual Event Format.
- 04 Set your event budget.
- 05 Determine the timeline for your event.
- 06 Select an Online Fundraising Platform.
- 07 Marketing, Outreach, & Social Media.
- 08 Event Sponsors and Partners.
- 09 Planning the Actual Event.
- 10 Event Reminders and Direct Links.
- 11 Event Rehearsal.

1. Establish Clear Goals

Is the primary goal of the virtual event to raise funds? Increase awareness? Engage with volunteers? Virtual events require concrete goals to guide the planning process. Write down a clear set of goals for your team and a specific purpose for the event. This will help focus your communications and fundraising throughout the event.

To begin setting goals, ask yourself the following questions (be specific):

- 01 What is your target fundraising goal?
- 02 Why do you want to achieve this goal?
 - A Is this for general operations? A specific program or campaign?
- 03 Who will help support this goal?
 - A These are the guests you will invite to this event.
 - B What is the target number of participants?
- 04 What do you want to accomplish with this event?
 - A How do you engage your attendees in multiple roles for the organization, such as donors, volunteers, and community partners?
- 05 How will you raise funds?
 - A Design a specific online Donation Page for your virtual event.
 - I Track donations and post event updates in real-time.
 - B Ticket price, registration: The perceived value of an online event may be lower than a traditional in-person event making the price of a virtual ticket or registration more accessible and affordable.
 - C Auction/Raffle/Other.
 - D Text to Give.

Virtual Event Goals:

Purpose for the Event:

* Goals can be based on past in-person events. If this is your first virtual event, acknowledge that these will be a guess and revised based on lessons learned and donor data for the next event.

2. Define Your Target Audience

Online events allow schools to expand their event's reach. Suddenly, guests don't need to be in the same place on a specific day and time. This can be a considerable advantage in terms of the potential size and scope of your event, but it will determine many of the details around planning and execution.

Know your audience and plan your event with them in mind. Here is a list of important event details to consider about your guests:

01 Small or large event?

A Does your target audience prefer high touch, small events or larger, or more anonymous events?

02 Multiple time zones? Day or evening event?

A This impacts the time of your event.

03 Virtual format (livestream channel)?

A What platform provides the best user experience for your intended audience? What platforms are they already comfortable with using?

04 Length of time?

A 30–60 minutes max. Know your audience's attention span and design the event to accommodate your attendees.

05 Outreach and communications strategy?

A Do they prefer email, Facebook, Instagram, LinkedIn, or other social media?

B Do they prefer hard copy invitations sent home or electronic invitations?

06 Is this a public or private event?

Who is your target audience:

3. Choose Your Virtual Event Format

There are so many different types of virtual events, from live performances and fireside chats to virtual galas and intimate salons. The most important things to consider include:

- What format best suits the interests and tech capacity of your guests?
- What format is most likely to help you achieve your fundraising goals?
- What level of interaction are you looking for with the audience?
- What is an appropriate length of time for the event format?

Here is a list of virtual event ideas, but we encourage you to be creative — anything is possible online!

- Interview / Fireside Chat with Principal.
- Expert Panel.
- Choir Concert.
- Theater Performance.
- Thank you Gala.
- Back to School event.
- Virtual Auction.
- Virtual Raffle.
- Virtual run or walk-a-thon.

Common Question: How to choose between a Webinar and Meeting?

Webinar:

- Think of this as a “broadcast” experience.
- Attendees mostly listen (only Q&A and chat available).
- Large audiences.
- Events open to the public.
- Event attendees do not interact with one another (can be anonymous).

Meeting:

- Think of this as an interactive event.
- High audience/host engagement.

- Ability to exchange ideas back and forth (discussions, Q&A).
- Smaller events/intimate salons.
- Event attendees are visible.

Breakout Rooms:

- Combines both Webinar and Meeting styles.
- Attendees join the event in a Webinar format, then the host can divide the attendees into “breakout rooms.”
- Allows for small intimate discussions and customized conversations (similar to meetings).

4. Set Your Event Budget

The good news is that there are fewer expenses associated with hosting a virtual event than an in-person event. In fact, you may raise less money but actually net more profit! Your most significant expense will likely be on your technology and livestream production needs.

Virtual Event Budget (Template)	Budget	Actuals
Virtual Event Platform or Software		
Marketing / Digital Advertising / Event Promotion		
Event Staff		
Event gifts / favors		
AV / Production		
Design, Branding		
Invitations / Audience Generation		
Entertainment, Emcee, Influencers		
Fundraising or Engagement tools		
Graphics		
Mailing: stamps, shipping, etc		
Awards		
Registration		
Program Costs		
Editing		
Misc		

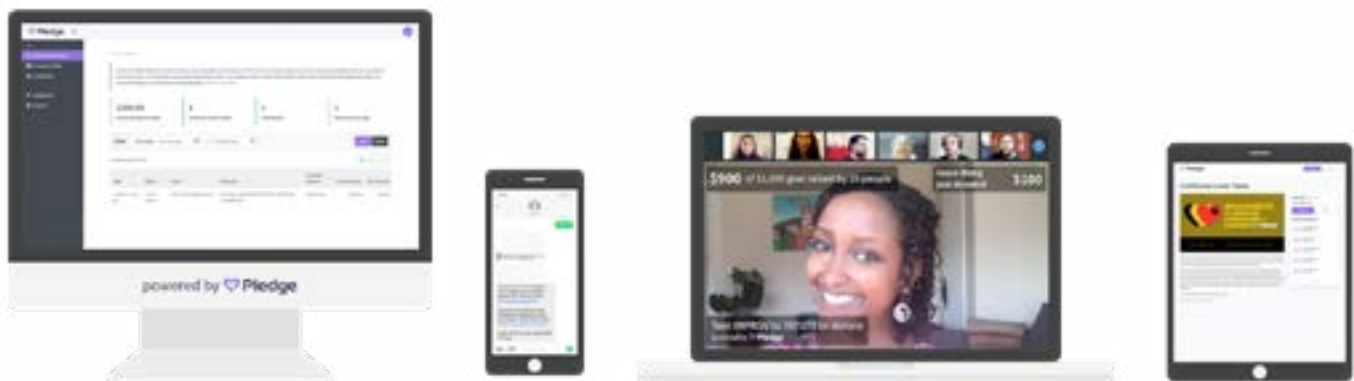
5. Determine Timeline for Your Event (minimum of 4-6 weeks, can be 3-6 months)

Preparation and a timeline are just as necessary in a virtual event as for your in-person event. Be realistic about how much time it will take to plan your virtual fundraiser. We've created template timelines for event planning, marketing, and technology needs in the appendix.

6. Select an Online Fundraising Platform

The best way to manage your virtual event is with an all-in-one online fundraising platform. There are many options available to schools for events of any size and scope. Top questions in selecting an online fundraising platform:

- Is it easy to use for all audiences?
- Does the platform offer mobile-optimized and easy to set up donation forms?
- Can you set up a custom fundraiser page and URL for your event?
- Is Text to Donate free?
- Will the platform provide instant donor data and email tax receipts to donors?
- What are the fees (aside from credit card processing)?
- Does the platform offer interactive fundraising features such as a virtual donation overlay, real-time donation tracker with total dollars raised, live donor feed, and donation call to action?



7. Marketing, Outreach, and Social Media (see page 8 Engagement/Comms page)

The key to driving attendance and engagement at a virtual event is marketing and outreach. Build a marketing plan to promote your virtual event and reach potential attendees using social media, email marketing, hard copy invitations/gifts, and other outreach within your budget.

8. Corporate Sponsors and Partners

Ensure you reach out to corporate sponsors and partners to help support your virtual event in the same way you would for an in-person event. Be honest and transparent about your organization's needs during this time and that their contribution is just as important, if not more so than in the past. Sponsors will want to know exactly how their donations will be used to help you meet your mission and will want to be recognized in your digital marketing, across social media platforms, in event materials, and during the live virtual event.

Virtual sponsor and partner recognition ideas include:

- Add corporate sponsors to online fundraiser pages and registration pages.
- Showcase sponsor logos in your virtual overlay during the live stream event.
- Allow sponsors to brand specific parts of the event, including pre- and post-event VIP/board gatherings, break-out sessions, Q&A, or featured entertainment.
- Send a COVID-friendly corporate-sponsored gift to event attendees at home.

What are some unique ways you can recognize corporate sponsors at your event?

9. Planning the Actual Event

The more detailed, the better. Planning out a script outline, a minute-by-minute Run of Show, and the content of your virtual event will help guarantee the success of the event and the entire attendee experience. The overall guiding principle for your virtual event should be quality over quantity. In your pre-event planning, consider the following guidelines / best practices:

- Deliver a clear message about your organization's mission and goal for the event.
- Keep it short. In today's oversaturated virtual world, your audience's maximum attention span is 30–60 minutes.
- Combine live and pre-taped sessions.
- Invest in livestream production quality – it matters. Your attendees will be more engaged and will donate more if they experience a well-produced event.
- Utilize several interactive engagement opportunities such as a virtual donation overlay, donation tracker with total dollars raised, live donor feed, and donation call to action.
- Call to Action. Make sure that you plan for a direct fundraising appeal and call to action during the event.

10. Event Reminders and Direct Links

Send attendees event reminder emails with easy to click calendar invites and virtual livestream links one week, one day, and the day of your event. Details include:

- How to register for the event.
- Where to donate (direct link to online donation page).
- What they may need to download.
- Direct link to connect to the live stream (Zoom, YouTube, etc.).

11. Event Rehearsal

Like preparing for an in-person event, plan a full rehearsal of your event to ensure that your video, sound, live-stream, and internet connection are all in order.

Tip:

Consumers have a low tolerance for a bad stream, watching for at most 90 seconds if the connection is spotty or poor-quality.

Rehearsals should include:

- Testing your hardware and software, including online fundraising tools, host computers, virtual cameras, A/V, production company equipment, microphones, security, lighting, etc.
- Test out the audience engagement tools such as the livestream platform engagement features such as the chat, virtual donation overlay, text to give, and more.
- Run through the script and production cues.

Marketing and Promoting Your Event

Communicating your mission should be your first goal. Lead with your mission and impact and discuss why you are more committed to your mission now more than ever during these challenging times. A strong “why” will attract your target audience. The following information should help you determine how to best market your event.

Tip:

The farther in advance and the more often you promote your event, the better. We suggest you start promoting your event 4-5 weeks in advance with frequent content about what folks can expect when they attend.

These are some different ways you can market your event:

- Event Page (Website).
- Email marketing.
- Social Media.
- Blog Posts.
- Press Release.

1. Event Page

Create a designated landing page – your event homepage – for your event. This is the online resource for everything about your event – the date, time, agenda, special guests, sponsor information, fundraising call to action, registration, and more. It is your opportunity to showcase compelling photos, videos, and testimonials and clearly communicate your mission to anyone who is considering attending or is new to your organization. Include event details on your organization’s home page with a clear link to the event page to register and donate. Make sure that all of your promotional content will point to this page.

2. Email Marketing

Utilize email marketing tools (like Mailchimp) to help you create engaging e-blasts to announce your event to your target audience and invited guests. Send a series of emails with previews about the event, important announcements, and special guests to entice people to register and attend.

- Add information about the event to your regular newsletter or email communication with donors and constituents. How far in advance do you need to plan to ensure that the event is included in this distribution?
- Stand out from all the noise! Your subject line is everything. Be creative and simple, and think about including an emoji or two to catch the reader's eye!
- Offer special discount codes to loyal followers who register through email communication.

Tip:

Keep your email short and sweet. Consider including pictures or a short video clip rather than text.

3. Social Media (Instagram, Facebook, Twitter, LinkedIn)

Make sure to promote the event across all of your social media channels and create a hashtag to increase its visibility. It's important to know which platform your target audience for each event uses the most. For example, different age groups are more active on Instagram than Facebook, and corporate sponsors may request that the event is posted on LinkedIn. Have a simple Call-to-Action that can easily encourage your target audience to spread the word by sharing your social media posts on their channels. You can be able to still attract new donors and even engage those who are not able to attend the event.

- What platform does your target audience use the most?
- Where do you have the most followers and influence?
- What are 3 ways to inspire your target audience to share information about your event on their social media channels?
- What is an easy call to action on social media?
- Can you ask your corporate sponsors to use their social media platforms to notify their contacts and followers about your virtual event?

Tip:

You can create different, compelling promotional materials for free as a nonprofit on Canva.

Blog posts are a great way to simultaneously attract people to your website and promote your event. Highlight parts of the event agenda — speakers and guests — and set an exciting tone to pique interest. Dedicate a few weeks of your blog to the upcoming event.

Identify 3 blog topics that promote the event:

01 _____

02 _____

03 _____

5. Press Release

For some events, press releases can be a useful way to share information about your event, speakers, and special guests. Determine whether your event contains content or features guests that would make it attractive to news desks and media outlets. If so, go for it!

Tip:

It is always worth submitting a press release for events starring a celebrity host, social media influencer, or performer.

During the Virtual Event

You must prepare for the virtual event with the same detail that you would for an in-person event.

Checklist

- Team (staff, vendors, volunteers).
- Cybersecurity.
- Attendee Interaction.
- Tech Support for guests.
- Live Donor Engagement.
- Call to Action (Fundraising, Volunteering, etc.).

1. Team

Just like a live event, you need to plan for dedicated staff, vendors, and volunteers to help the virtual event run smoothly. We highly recommend putting together a detailed Run of Show to coordinate all of the people involved. This will ensure that the technology and A/V teams clearly understand the event flow, speakers are well prepared, know their cues and keep within their allocated time frames, donors are engaged, and appropriate security is in place. Other key roles include:

- Staff or volunteers to be on-call for any tech support issues (both for event participants and attendees).
- Staff or volunteers dedicated to the attendee/donor experience (managing the chat, answering questions, working with the backend fundraising platform for live donations, etc.).

These individuals should be able to communicate swiftly and effectively, so setting up a back-channel for communication is crucial.

- Host:

- Additional Speakers / Special Guests:

- Tech Support:

- Donor Experience:

- Fundraising Platform / Live Donations:

2. Cybersecurity

It's essential to think about cybersecurity and data privacy for your virtual event. When choosing a live event platform, ample security must be in place to protect the event and the registered attendees from unexpected guests ([Zoombombing](#)) or anyone accessing personal data. As fundraisers, we are given valuable, personal information from our donors. Our organization's reputation depends on the ability to safeguard this data.

Questions to consider:

Security Suggestions:

- Use a Zoom webinar instead of a meeting.
 - Only allows content sharing, audio, and video for panelists.
 - Attendees are placed in "Listen & View Only" mode when they join the webinar.
- Require event registration.
 - Select a virtual event platform with integrated event registration.
 - Preview registered participants, limiting the risk of disruptions or unwanted guests.
 - Seamlessly collect attendee / donor contact information.
 - Control when guests receive the live event link.
- Never share your live event link publicly on social media or other advertising spaces.

Plan:

- 01** Have you thoroughly vetted the security measures of both your virtual event and online fundraising platforms?
- A** Encryptions.
 - B** Password protections.
 - C** Custom registration links.
 - D** Ability to approve or deny registrations.
- 02** Does it make sense to get cybersecurity insurance?

Tips:

"Part of the problem with the virtual event security breaches we've seen thus far is planners throwing public URLs out onto the web and including all information completely publicly without any thought whatsoever to privacy or security."

— *Brandt Krueger, Technical Producer at Event Technology Consulting*

Virtual event security has been made worse and more complicated because of the increase in people working from home without any sort of corporate firewall to protect them.

3. Attendee Interaction

Encouraging event attendees to use a live chat or Q&A board during the event is a fantastic way to make your guests feel connected and heard. Engaging and responding to attendees throughout the event increases the feeling that they are part of the event and is an additional tool to help raise funds. Therefore, it is imperative to dedicate a member of your team to focus on these communication channels.

Suggested interactions:

- Remind people to donate in the chat.
- Answer questions in real-time.
- Thank donors as contributions are made in the live donation feed.

Plan:

Prepare for any FAQs that you anticipate coming up during the event. Draft responses for those questions before the event.

FAQs:

4. Tech Support for Guests

It's always a good idea to have a troubleshooting plan if guests cannot log in to the event or speakers have technology issues. Assemble your team of individuals with tech experience to help you. Provide ample time for them to familiarize themselves with the technology and make sure they are available during the event to resolve any issues. Let your speakers and attendees know that tech support will be available and share the contact information in advance. Finally, have at least one person monitoring the chat to flag and address any problems before they get out of hand.

Suggestions:

- 01** Provide a "help desk" email when individuals register for the event.
- 02** Send all registered attendees detailed information, including the virtual event link, log-in instructions, how to navigate the fundraising platform, and help desk contact info for help.

Plan for Tech Support:

- Who is your tech support team?

- What is the backup plan for tech issues for guests?
-
-

5. Live Donor Engagement

Increase fundraising during the event by engaging your attendees with real-time features. Use interactive tools that allow you to communicate your mission and the impact that donations will make to help achieve your goals. Connect with your audience using multiple forms of communication. If appropriate, the host can acknowledge donors and corporate sponsors during strategic times and create a clear ask during the fundraising appeal.

Suggested Engagement tools:

- Videos.
- Live chat.
- Clap-o-meter.
- Virtual donation overlay.
- Free text to donate.
- Live donor feeds.
- Impact calculator displaying total dollars raised.

Plan for Attendee Engagement:

01 What engagement tools are appropriate for your event? Your audience?

02 How do you want to communicate your event goals? (Dollars raised? # of people helped?)

03 Do you want to recognize donors in a live feed throughout the event? Display periodically? Keep donors anonymous?

04 How will your host and speakers make the attendees feel connected to the event?

6. Call to Action

First and foremost, your virtual event's goal is to raise funds and awareness for your organization. Even if you are not making a direct financial ask, you are asking for your guest's valuable time, and we all know there is a fundraising element behind every school event. Make sure to have a clear call to action during the event. This is your moment to inspire people to get involved. Go for it!

Suggestions:

- Clear financial ask to meet a specific fundraising goal.
- Auction/Raffle or another challenge.
- Donation match (major donor, foundation, corporate sponsor, etc.).
- Text to Donate campaign.
- Call for volunteers.

Plan:

01 What is your call to action?

02 What are the event goals for this fundraising appeal? (financial and volunteer)

03 What levels are appropriate to ask for with the attendees of this event?

04 How can you make the ask fun, engaging, and/or meaningful?

Run of Show

Event overview:

This is a high-level summary of the entire virtual event, including details about who will speak, a detailed timeline, features that are live vs. pre-recorded, a script outline, and more. Details to outline in your Run of Show:

- Detailed Timeline.
- Script Outline.
- Taped vs. Live.
- Host and Speaker Notes.
- Cues for Event Materials.
- Graphics.
- Sponsor Recognition.

Tip:

Interactive element: The more detailed you make your Run of Show, the smoother your event will go!

Sample Run of Show

Key:

Black – Host content notes

Blue – Video format

Orange – Production cues

Pre-Party: Virtual gathering before the event begins (board hosted Zoom's, VIP engagement, etc.)

Pre-Show: Pre-show slides/music (begin 10 minutes before show)

- **Sponsor logos and photos rotate through every 30 seconds, starting 10 minutes before the show**

1. Opening Credits (45 secs) **PRE-TAPED VIDEO**

- **Thank you's, acknowledgments, photos, sponsors – your unique opening.**

2. Welcome by Event Hosts (2 mins) **LIVE**

- **Text to give box rotates with an organizational fact or FAQ every 30 seconds.**

- Intros and thank people for taking the time to join.
- Overview of school and mission.
- Encourage people to use the chat.
- Explain any livestream features and give run-of-show (what to expect).
- Intro Principal, or PTA president/host

3. Principal or PTA President (5 mins) LIVE or PRE-RECORDED

- Context for new guests.
- School update (since last year's event, accomplishments for the year, changes of note, etc.).
- Fundraising Goals.

4. Host(s) (1 min) LIVE

- **Bring up Virtual donation overlay, Text to Donate, etc.**
- What to expect at tonight's event: featured speakers / guests / program participants / etc.
- Explain online fundraising tools and how to use them during and after the event.

5. School Video (3-5 mins) PRE-TAPED VIDEO

- Show the compelling story about your school and mission (think sizzle reel!).

6. Host Interlude (30 secs) LIVE

- Intro of the students/teacher/club(s) – this is a highlighted individual or club/team who is a beneficiary of your fundraiser.

7. Featured Teacher, Student, Faculty, etc. (10-15 mins) LIVE

- Tells their personal story and the impact of your school on his/her life.

8. Fundraising Appeal (10 mins) LIVE

- **Feature online fundraising tools and explain to the audience how to use them**
- Clearly explain fundraising goals for the organization.
- Here are the levels of what your gift will support... Here is what we need and why.
- Intro final Speakers/Special Guests/Celebrity/Fireside Chat.

9. Host Closes Out (5-10 min) LIVE, then transition to slides

- **If interested in learning more info, Contact info, Donate info.**
- Thank supporters - corporate sponsors, foundations, families, donors, etc.
- Thank attendees, speakers, special guests, etc.
- Announce the grand total.
- Roll sponsor logos.

- Optional Q&A

Post-Event Party: Virtual gathering after the event closes

- VIP virtual event (exclusive conversation, concert, lesson, etc.).
- DJs.
- Networking events for small groups.

Post-Event

After the virtual event is over, you will want to make sure to follow up with all of your donors and review the data from your event.

Checklist

- Debrief with your team.
- Follow up with all of your attendees and donors.
- Review event metrics.
- Continue sharing event highlights and the fundraising call to action.
- Send out a post-event survey.

1. Debrief with your team

Make sure you debrief the event with your team. Ask your team what went well, what did not work well, and where you can improve for the next event. If possible, try to get feedback from board members, staff, and event vendors.

- What went well?
- Where did we fall short, or where did we meet significant challenges?
- Were there any surprises?
- What would you suggest we do differently for the next virtual event?

2. Follow up with all of your attendees and donors

Immediately follow up with a thank you to your attendees, donors, event hosts, and special guests. Send tax-receipts to all donors, or better yet, utilize technology from your online fundraising platform that automatically sends these acknowledgments for you. Personally reach out to major-gift donors with sincere appreciation and an inquiry on how they would like to be kept informed about the organization's ongoing activities. To those guests who expressed an interest in volunteering, send out clear instructions on how to stay involved with your school.

- Did you send thank you emails to all of your donors?
- Ask your donors what form of communication they prefer and if they would like to be kept updated.
- Did you send event highlights to your target audience and all registered guests?
- How can you continue to stay engaged with event attendees?

3. Event Metrics

One of the benefits of virtual events is that you can instantly track specific metrics about your donors and the event. You can learn a lot about what motivated attendees to donate during the event, the average donation levels, where they are from, and more. Use this data to learn what is most effective with your donor-base and expand it for your next virtual event.

Suggested elements to track include:

- Total dollars raised.
- Unique donors (new and recurring).
- Donor maps (where they live).
- Timestamps (did they donate before, during, or after the event; what time during the event did they donate).

Questions to answer:

- At what points during the event did you see the most donor engagement?
- How did you do compared to your fundraising goal?
- What are some trends observed that can help to improve future events? (# of participants, \$ raised, exciting parts of the event program, etc.).

4. Continue sharing event highlights and the fundraising call to action

After a successful event, send out a link with the event video and/or highlights to attendees and people who expressed interest but could not attend. Include the event recording link in a summary email to board members, donors, event attendees, and on your social media channels. Make sure to correlate the dollars raised during the event with the impact it has made for your organization and the ongoing opportunities available to donate and volunteer.

Tip:

Most donations happen within the 48 hours before and after the event.

- How do you communicate the ROI of the dollars raised with the impact it has made for your organization?
- How long will you leave the event page online and the donation campaign open?
- What is your plan to follow up with interested guests and potential future donors?

5. Post-event surveys

Post-event surveys give you valuable insight into your event so that you can improve each virtual event. You can send these out to attendees, staff, vendors, sponsors, board members, and key constituents. Asking key questions will allow you to understand what your guests enjoyed about the event, areas of improvement, and valuable overall feedback. Keep it short, you don't want to overwhelm guests who just took the time to attend your event with a lengthy survey (10–15 questions max).

Case Studies

Learning directly from schools and PTAs who have organized fundraising events is imperative to developing effective fundraising techniques. These case studies showcase unique schools and organizations who chose to fundraise during their virtual events.

Kansas State University Foundation



The Kansas State University Foundation hosts an annual fundraising campaign for alumnus, called All in for K-State. This event is kicked off with a meeting for their trustees, their high volume, high touch donors. This was their first time introducing text to donate and a live overlay to their constituents and it was seamless and professional.

Quote: “The Pledge platform allowed us to not only to actively solicit donors in the moment, but also surprised and delighted them with live display of their individual and collective giving. In an age on philanthropy when an omnichannel approach is vital to cutting through the noise, the Pledge platform provides a new age solicitation method and eases the process of giving.” Eric Holderness, Associate Vice President of Development

“Pledge was a perfect compliment to our Trustee virtual event. Rather than wait to solicit them after the moment of impact had passed, these highly engaged donors were given a dynamic opportunity to give on the spot. It was so fun to watch the momentum spur other gifts in real time. I can’t thank the Pledge team enough for

their collaboration and top-notch customer service.” Candace Stimmel, Assistant Director of Volunteer Engagement

Campaign Duration: 30 minutes

Tool Used: Text to Donate, Fundraiser Page, Virtual Donation Overlay

Menlo School

Menlo Middle School - Fire Relief Drive

powered by Pledge

\$2,575 of \$2,500 goal
raised by 35 people

[Donate](#) [Share](#)

Recent donations

- \$25** Susan Edwards 3 months ago
- \$50** Anonymous 3 months ago
- \$65** Anonymous 1 months ago
- \$100** Jennifer Johnson 3 months ago
- \$100** Andrea Olania 3 months ago

[See all](#)

Middle School Fire Relief Care Package Initiative

This week, November 16-20, the Menlo Middle School will be coordinating a materials drive on the Menlo campus. This project is focused on addressing the effects of the recent California wildfires. The goal of the Care Package initiative is to donate 100 care packages to families whose homes have been destroyed by these wildfires in order to provide them with essential items for the holidays — food, drinks, toiletries and masks. We will be working with the [Central Coast Chapter of the American Red Cross](#) to disseminate the care packages.

Menlo School needed to act quickly when their community encountered fires and many families were forced to evacuate and some lost their homes. This fundraiser was set up within five minutes during a PTA meeting when the parents sprung into action.

Quote: “It was such a great experience to work with Pledge for our recent middle school fundraiser. We raised money to donate to a local homeless shelter, and we raised significantly more than we thought was possible! It was so easy for the parents to donate through Pledge. Thank you so much for providing such an easy, safe, and effective platform for fundraising!” -Señora Barad, Instructor

Campaign Duration: 1 week

Tool Used: Text to Donate, Fundraiser Page



Ronald C. Wornick Jewish Day School hosted a night of laughs and joy to celebrate their community and students through their annual gala. They host many community events on Zoom during the school year, but this was the first time an event incorporated fundraising.

Quote: We were concerned that taking our gala online this year would eliminate the energy that comes during live fundraising events. When we saw what Pledge could do, we knew that had to work with them. There's no fee for the non-profit, it's easy to use, the team is responsive, and they have incredible tech for Zoom! During our Fund the Need, a fundraising overlay appeared on the Zoom screen. Attendees could provide their name or be anonymous and their donation would appear on the screen in real-time. We were able to reach our goal and will definitely work with Pledge for future fundraisers! - Haggit Sandhaus, Director Of Development

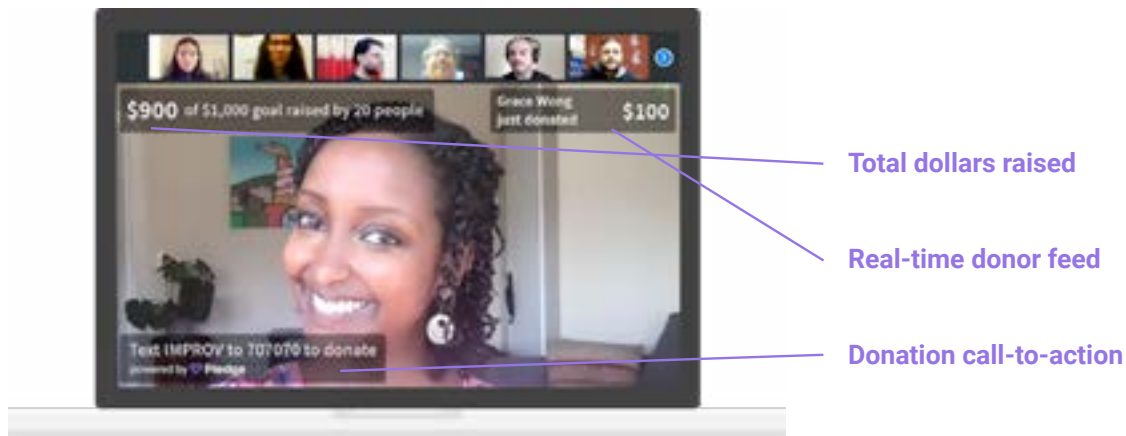
Campaign Duration: 1 hour

Tool Used: Text to Donate, Donation Widget, Zoom overlay

Glossary

You might be asking yourself about the meaning of some new different terms used to talk about virtual events and online fundraising. Here's a quick glossary of terms for your reference.

- **Virtual Event:** An event that is strictly online where individuals experience the event and its content from wherever they are rather than gathering in-person. The event can be pre-recorded, or it can be livestreamed so that the audience can engage in real-time, using technology like livestreaming, video conferencing, and peer-to-peer fundraising software.
- **Livestreaming:** When an event is happening live online. Viewers can choose from various platforms, including Zoom, Youtube Live, Facebook Live, Instagram Live, Twitch, LinkedIn Live, and more.



Virtual Donation Overlay: An engaging visual display integrated into a Zoom meeting, Google Hangout, or other video conference/streaming service. It can include an impact calculator (total dollars raised), real-time donor feed, and donation call-to-action. Example above.

Real-time Donor Feed: An impact calculator that links donor names and contribution amounts from your fundraiser page to your live event in real-time, allowing attendees to see who donates and how much during the live event. You can see an example of it in the above picture of the virtual donation overlay in the top right corner.

Live Donation Tracker: An impact calculator that links donations from your fundraiser page to your live event in real-time, allowing attendees to see the total dollars raised during a live fundraiser. You can see an example of it in the above picture of the virtual donation overlay in the top left-hand corner.

Call-to-Action (CTA): A verbal or visual ask for donations. A verbal call-to-action is usually made by a host or special guest. A visible CTA is typically displayed throughout the virtual event, encouraging attendees to donate. In the picture above, 'Text FASTPITCH2020' is an example of a CTA.

- **Fundraising Platform:** Technology software that is used for fundraising. Some examples include fundraiser pages, mobile-optimized text to donate, impact calculators, virtual donation overlays, donation widgets, etc. This can also be referred to as online fundraising tools.
- **Donation Widgets:** A short series of fields you can fill to donate that includes a donation amount and other standard donor information (name, credit card information, etc.).
- **Fundraiser Page:** A custom web page for your fundraising campaign that can include pictures, a narrative behind the campaign and specific place to donate, a real-time list of donor names and amounts (or anonymous), and more.
- **Mobile-Optimized Donation Tools:** When the fundraising tools are designed to fit and function properly on a mobile device rather than a computer. This is used because people are starting to donate more often from their phones.
- **Real-time Donation Data:** Immediate access to the total raised and donor information that comes through your online fundraiser page.
- **Zoom Integration:** The ability to integrate your Zoom meeting or webinar with your virtual fundraising technology.
- **Text-to-Donate (T2D):** Setting up a custom keyword and specific number to text to donate directly to your fundraiser page.
- **Native Donation Capabilities:** The ability to embed a donation capability directly into your own website or an additional platform instead of linking to an external donation page.

Timelines

Date	Tech Timeline	Marketing Timeline	Event Timeline
4 weeks before	<ul style="list-style-type: none"> • At what points during the event did you see the most donor engagement? • How did you do compared to your fundraising goal? • What are some trends observed that can help to improve future events? (# of participants, \$ raised, exciting parts of the event program, etc.). 	<ul style="list-style-type: none"> • Start drafting copy based on goal, theme, and any confirmed hosts of the event 	<ul style="list-style-type: none"> • Determine date of event • If you plan to invite local heroes or celebrities, confirm their availability before settling on the date • Determine goal & theme of event
3 weeks before		<ul style="list-style-type: none"> • Send first email about the event 	<ul style="list-style-type: none"> • Ask for sponsorships & matching funds • Outline the run of show & make a list of all the elements you will need to curate
2 weeks before			<ul style="list-style-type: none"> • Gather any pre-recorded elements of the show
1 week before	<ul style="list-style-type: none"> • First tech-rehearsal of the event! 	<ul style="list-style-type: none"> • Tease what is going to happen during the event on social media – share any guest performers, hosts, etc., to get folks excited! (always include the donation information in marketing materials) 	

3 days before	<ul style="list-style-type: none"> Send all registered attendees detailed information, including the virtual event link, log-in instructions, how to navigate the fundraising platform, and contact info for help. Second tech-rehearsal of the event! 		
Day of event	<ul style="list-style-type: none"> Make sure the event security is appropriate & the livestream/ pre-recorded elements work correctly. 	<ul style="list-style-type: none"> Post a reminder on all social media platforms that the event is today Post on social media “stories” to share live updates for anyone who can’t attend in real-time during the event. 	<ul style="list-style-type: none"> Hyperlink to during event run of show
Day after event	<ul style="list-style-type: none"> Monitor donor data – at what points during the event did the most donations come through the platform? 	<ul style="list-style-type: none"> Thank everyone who came & post a wrap-up social media post or blog post If you’ve recorded the event, you can mail this out with the thank you message to anyone who couldn’t attend 	
Week after event			<ul style="list-style-type: none"> Send any auction prizes and thank-you notes to hosts of the event. Circle back with your team & board to reflect on how the event went.