SISTER DISTRICT PROJECT

Virtual Fundraisers Step-by-Step Guide

Updated January 11, 2022

Sister District teams design and put on an impressive variety of quality events. Though each team and each event is different, and thus will require customized approaches to planning, promoting, and execution, the good news is that, on the whole, the core recipe of things that should happen and when they should happen is straightforward and broadly applicable.

To that end, **the following is an event production and promotion schedule, using a candidate appearance meet & greet as an example.** If you follow the steps and recommendations below, and work with your Organizing Department staffer early and often as needed, you and your event will be in good shape!

Resources

- Watch this recording of a 45min event in this model: State Bridges Apr 7 2021 46min
- Mobilize Guide
- Fundraising Guide
- Action Network Guide
- Sample 30-minute Agenda
- Working Doc and Sample 45-minute Agenda for 1-2 guests
- Case Study on Making a Financial Ask on a Virtual Call

4-6 Weeks Before Event

1. Settle on a concept -- in this case, a virtual Candidate Appearance Meet & Greet Fundraiser -- and choose a date and time for the event

2. As early as possible in your process, use the Candidate Appearance Request Form to secure your candidate for the specific date and time.

Right away once your candidate is confirmed . . .

3. Establish the ActBlue link you'll use for the event. We suggest using refcodes to help you track fundraising progress, results, and to help your team thank donors after the event. Please see the Fundraising Guide for more.

4. Set up a Zoom meeting. See our How-To: Mobilize guide

5. Set up your Mobilize event page for the event. See our How-To: Mobilize guide

7. Send your first email. See our Action Network Guide

You will need:

- Title of the event
- Date and time
- Promotional copy (2-3 sentences)
- ActBlue link w/ refcode
- Link to Mobilize RSVP page
- Images of special guests (check out the Image & Video Asset Library)

8. Share on social media (see How-To Guide: Social Media), with a plan to continue sharing and promoting through the event and celebrate/re-cap after

Case Study: CA Peninsula in the Bay Area held a fundraiser where they had a local (CA) state senator interview the candidate. They used vibrant language in their invites, planned meticulously, and raised $5,900 for their candidate, boosted by a $5,000 match to Sister District!

3 Weeks Out

9. Individual outreach is key—don't just rely on email blasts! Invite your own friends. Deputize all leaders involved as recruiters. Set goals for recruitment for each leader, track and celebrate progress-to-goal. Game-ify recruiting. **Reach volunteers by phone and text.** Work with your Organizing Department staffer on a personal outreach recruitment plan. See the Volunteer Recruitment By Phone Guide and ask your Organizing Department staffer to set up Hustle text recruitment for your event.

> **Case Study:** Read about how Sister District Wisconsin deployed a multi-prong recruitment strategy for their kickoff with our Executive Director and their candidate that raised over $2,000. In addition to emails, Instagram, and Facebook, leaders also sent heartfelt individual messages to personal networks, and leaders called every single person on their list.

10. Create a Working Doc to prepare a draft agenda/run-of-show for the event. All organizers of the event will work in this doc. You can open the following Google Docs, make a copy, and customize for your event. Your Organizing Department staffer would be happy to help you customize.

- Sample 30-minute Agenda
- Working Doc and Sample 45-minute Agenda for 1 or 2 guests

11. Send another single-focus invitation email; include in your team's newsletter. Continue promoting your event through personal 1:1 outreach (phone, text) and social media.

1 Week Out

12. Convene an Event Run-Through meeting 5-10 days out with everyone involved in the event. Use your Working Doc. Finalize the agenda, make sure links and notes are correct, and clarify roles.

13. Send a final invitation email. Continue promoting your event through personal 1:1 outreach (phone, text) and social media.

1 Day Out

14. Send a reminder email the day before the event.

Morning Of The Event

15. Send reminder texts the morning of the event. (Sample text below.) Recall that calls and texts are 50% to 177% more effective than just sending email reminders. To download a list of your registrants from Zoom, follow the instructions here.

The Event

16. Hosts and Co-Hosts to join the call at least 15 minutes early so that Hosts can designate Co-Hosts. Do a check of screen sharing settings if needed.

17. When the event begins, make sure to welcome people as they join, and thank them for joining. We suggest inviting people to post in chat where they're joining from or other ice-breaker prompt.

18. It's showtime! We recommend starting about 2 minutes after the official start time so that folks have time to settle in. And if you're planning to record the event, make sure that it is recording.

19. And don't forget to take a screenshot, or selfie with your screen—make sure you're using Gallery View so you can see everyone. Then share it with us so we can amplify your work!

1-3 Days After the Event

20. Send a thank you note to attendees, include the final total raised in a recap to all attendees to thank them for participating. Invite them to the next event on the calendar, and ask them to bring a friend! See How To Guide: Donor Relationships.

21. Email Editor and Social Media Leader to recap and celebrate, sharing images, highlights, total fundraising haul, applaud special guests and organizers. Here's an example from SD MA-RI after the April 7 State Bridges NVM event:

SISTER DISTRICT PROJECT
MA-RI



To everyone who attended our New Virginia Majority event last night (virtually, of course),

Thank you for helping make our inaugural State Bridges event such a success! Not only did we hear from NVM Co-Executive Director Tram Ngyuen about blue-trifecta triumphs - since 2020, Virginia state legislators have passed 165+ pieces of progressive legislation! - we raised almost $15,000 for this critical organization. Since 2015, NVM has knocked on 1 million + doors, reaching out to women, low-income workers, young people, and people of color to build a truly "new majority" in the state.

If you couldn't make it, we missed you. If you're so moved, click the button below to make a donation to NVM. Every dollar you give goes straight to keeping Virginia progressing... progressively. THANK YOU.

DONATE to New Virginia Majority

Stay tuned for our next event. Until then, stay healthy. We need you!

The Sister District MA-RI Team