**Virtual Event Checklist**

# Advancement-led small donor engagements

## EVENT DETAILS

Event lead(s): *First Last, First Last*

Purpose/Goals: *Panel of faculty to discuss Finnish research*

Location: *Zoom [link]*

Date: *Thursday, July 30, 2020*

Time: *5 - 6 pm*

Headcount: *7 - 12*

## DECISIONS TO MAKE BEFORE YOU START

* Determine event goals and objectives including key speakers or faculty involvement
* Determine if this is a Zoom meeting, Livestream, or other online engagement
* Determine if there will be any in-person coordination, or delivery of meeting materials/gifts/food
* Submit a [PIF](https://admin.artsci.washington.edu/project-inquiry-form) well in advance

## PLANNING & PREPPING

* Pre-event meeting to discuss logistics such as the details listed above.
* Create your Zoom link, or other technical needs
* Create budget if needed
* Consult with MarComm and AdSer to pull invitee lists, track RSVPs
* Post your event online
* Begin briefing
  + Be prepared to provide speaker/key attendees 2 weeks in advance of the event
* Send reminder email to attendees: RSVP info + Zoom meeting details + offer to test tech prior
* Finalize Attendee list-- for admitting people from waiting room into Zoom call
  + Be prepared to track attendance
* Prep / pre-event meeting with speaker(s) just prior to event date.
  + Reference Zoom Event Prep Meeting Script for prompts.
  + Use the Zoom link you plan to host the event on to ensure Zoom is set up correct.
  + Provide speaker/key attendees with final brief at this time if you have not already.

## POST EVENT

* Request an Activity Code to record attendees vs registrants if you are NOT using Cvent
* Thank you and letters to strategic guests
* Post-event evaluation/survey the week after the event (when appropriate)
* Review budget and make sure all charges are accurate (if budget was needed)