



## The 100% Definitive, Fail-Proof Guide to Donor Cultivation Events: Beyond Backstage...Extra Secrets!

### 1. Create specific goals and draft a clear plan of action.

Your goal may be to raise funds, but are you planning to accomplish this only at the event? Donor engagement is a long-term project. Your event could also be less focused on donations today, but with an eye for long-term support. As an organization matures and has a group of key supporters, you might also want to organize a donor event that provides a special opportunity to connect without an ask for a donation. For example, prior to a campaign, you may wish to host an intimate event strictly for qualification or cultivation purposes.

On the other hand, a solicitation-oriented event could work best for you depending on the goal of your organization, where you are in your campaign or fiscal year, etc. To make a solicitation-oriented event go well, remember that you need several essentials:

- 1) A skilled asker (the host, a staff representative, a board member, an already committed donor)
- 2) A clear project, dollar goal, and suggested gift amount. Avoid the “give to whatever level you feel comfortable with or can.” That’s annual fund language!
- 3) A way to make the gift happen. It’s taken for granted, but make sure you have gift cards, pledge forms, credit card capabilities, etc.

### 2. Invite at least 6 weeks out and follow up within 3 days.

Marketing and outreach will enable your fundraising event to reach the greatest number of people possible in your target supporter group. Social media and most electronic invitation systems are free.

Remember that as part of your planning protocol, to follow up within 3 days of invitations being received (by mail, by e-mail, etc.). Carefully plot out who is making the follow-up communications, by what method (phone preferred with an email to follow up when you

can't reach the invitee), and be sure to have answers to frequently asked questions handy. (Hint: all of the answers should be generally the same: "We'd love to have you with us," "You mean so much to our mission," etc.). If the question arises "Will I be asked for money?" you should answer honestly ... either "No – this event is not an asking event, but rather to gather some of our closest friends and supporters for fellowship" ... or "You will have a special opportunity to consider joining others in attendance in helping us, yes."

Be sure to track all follow-ups in a sharable document that all can access!

### 3. The inspiring speaker makes or breaks the event.

What is the best way to convey the impact your organization has on your beneficiaries? Most of the time, it is through a story. The story is where the heartstrings are tugged, where the organization stands out, where the impact is felt and serves as the rationale for giving generously. Your mission speaker must nail it! Invite your speaker – whether the host, or a program recipient, or anyone in between – to tell THEIR own story in THEIR own words, naturally. Meet or connect with the speaker a week prior to the event to hear a dry run of the story, and suggest anything that needs to be drawn out or de-emphasized. The best remarks will be 4-6 minutes in length and will follow this format: Problem, Solution, Impact, Gratitude.

Don't worry about "name recognition" or making the mission speaker a "draw." Authenticity and emotion in the moment is all that counts.

### 4. Have clear messaging across all staff and volunteers.

Staff and volunteers, most especially the hosts, are the ambassadors of your organization. Make sure they are well-equipped and informed to represent your work. Provide collateral material, gift cards, etc. for guests to take with them, so they can share the word or learn more about the serious details even after the event.

The best time to distribute collateral material is on the way out the door. Many brochures or books presented on the way in tend to get "accidentally left behind" at the venue. Also, don't stuff materials into a bag. Keep them loose so that nothing is between the materials and the donor's hand. Items in bags tend to be left in bags!

### 5. What's an ideal format for an in-home event?

Two hours is an ideal length. You can accomplish everything you need to within this timeframe: fellowship and mingling, a compelling spoken word program including the mission speaker, and time for follow-up (i.e. giving, signing up, or whatever the call to action was). On the invitation piece, list the end time (6-8 p.m.; Noon-2 p.m., etc.). This is important so that guests are aware of when the event will end. This allows them to plan the rest of their day around your event. One of the reasons guests don't attend donor cultivation events is because they're unsure of how much time they'll need to commit to going!

Here's a great format for a hypothetical event in a donor's home from 6-8 p.m.:

4:00 p.m. Organization representative(s) arrive, perform necessary set-up, make necessary tweaks, etc.

5:30 p.m. Be ready for the first guests to arrive. We know the invitation said 6 p.m., but someone's got to be extra-early, right? (As a rule, and not to generalize, but the older the crowd, the earlier they'll arrive.)

6:00 p.m. Event begins, hospitality ready, hosts and staff in place

6:00-6:50 p.m. Fellowship, mingling, etc. (Make sure the wallflowers are engaged with! This is the host's job followed by the staff's job.)

6:50-7:15 p.m. Spoken word program in this order: (1) Host welcomes everyone and expresses gratitude and the purpose for gathering (don't hide the purpose if the purpose is asking!); (2) Mission speaker; (3) Response speaker – this is typically the ranking member of the organization, a board member, etc. who ties the mission speaker's remarks into the needs and opportunities of the organization; (4) Call to action. This can be made by the Host (ideally), or continued by the response speaker. Most authentically, the host makes the call to action, whether an ask or an invitation to engage, volunteer, or whatever the need is.

7:15-8:00 p.m. Additional fellowship, folks taking calls to action, etc.

8:00 p.m. Event concludes. Note: The event will hardly ever conclude right at 8 p.m. Like with any party, there will be stragglers. If good conversation is flowing, don't cut it off because of a pre-advertised end time. If the stragglers aren't, well, contributing positively, don't be afraid to thank them profusely for coming and remind them that we want to respect the host by clearing out as promised!

## 5. Extra Backstage Secrets...

a) Collect e-mail addresses at the Donor Cultivation Event. This is a chance to build your database just as much as your coffers!

b) Mail follow-up letters within 3 days of the event. The letter should be co-signed by the host(s) and the ranking member of the organization who was in attendance (CEO, Board Chair, DOD, etc). The letters should thank the guest for attending, reference something specific said as part of the program (to avoid this sounding like a form letter), remind guests of the opportunity at hand, and double-down on the call to action made at the event. If gifts were made at the event, then the letters are tweaked accordingly. Most importantly: Hand-sign the letters in wet ink, hand-write the outer envelope, and live-stamp it. This will increase your open rate!

c) Know the culture of the organization when making food and beverage choices. What will the optics look like of investing too much or too little in hospitality?

d) We get lots of questions about live musicians (strolling violinist, piano, etc.). It's great to have if you can access it; just make sure it's optically appropriate and that the music is cut off during the spoken word program!

e) How much is the right amount to ask for? This depends on the goal of the program, and the particular project. (First, it's ideal to identify a specific project or campaign. The purpose of a donor cultivation event isn't to seek unrestricted gifts to the general fund. You shouldn't avoid holding these events if you only raise unrestricted money, but if you can at least designate toward a particular project, this gives your attendees a collective goal, an enemy to defeat, etc.). If you are doing a live appeal, we suggest having a "plant" in the audience who will agree to the highest gift level you start with. Remember that nobody likes to be first, and if someone has pre-agreed to get the giving started, the room usually "de-tenses" and the lower level gifts start flowing. How low should you go, you ask? Ideally, until everyone in the room has participated ... hopefully not lower than the \$250 level, keeping in mind your room should contain capable individuals only.

f) Have a credit card reader available! Whatever technology your organization uses for mobile events should be on-site. Square readers even work well (and can be free!). Please don't write down credit card numbers and "run it tomorrow at the office." This can create donor anxiety and buyer's remorse. Take advantage of the emotion of the moment!

Have more questions? We are here to provide wisdom, and to help. Please reach out to Scott Koskoski, at [scott@carpediemfundraising.com](mailto:scott@carpediemfundraising.com).

We are here to help you Seize The Day!

Carpe Diem Fundraising