

Small Events for Donor Cultivation | Kathy Drucquer Duff

Please find a list below of additional resources from the “*Small Events for Donor Cultivation*” webcast. These resources will be referenced during the webcast by the presenter. If you wish to print only certain resources, you may click their respective links to jump directly to them in the packet.

Pre-Webcast Resources

1. [Strategy Sheet Sample](#) – Pages 2-5
2. [Host Overview Expectations](#) – Pages 6-7
3. [Best Practices Planning](#) – Page 8
4. [Best Practices](#) – Pages 9-15

SUCCESSFUL SALON EVENTS

January 28, 2016 | 1:00-2:30 p.m. EST

Additional resource: Salon Event Strategy Sheet Sample

Purpose of Event

The purpose of a salon event hosted by xxx at their home is three-fold:

- to engage xxx prospects in an informal environment;
- to share the mission, vision and purpose of xxx with new audiences;
- to set the stage for development to discuss the xxx Campaign/Program/ Initiative.

When & Where

The celebration could take place in mid-February at the home of xxx. An evening event, from 6 to 8pm.

After a moderate amount of conversation and mingling with wine and heavy appetizers hors d'oeuvres, guests will enjoy a brief program consisting of a welcome from the hosts and xxx. Xxx alumna will share her story and trajectory of success. Xxx will share recent accolades and the xxx video along with a brief overview of the xxx.

Key Attendees

Xxx leadership along with potential xxx will be present at the event. The guest list is at the discretion of the xxx. The ideal number of guests is 20 with no more than 25 guests and no less than 15. Development staff can assist in vetting and/or suggesting individuals who may be interested in learning more about the xxx school. The ideal guest is (possible sample population):

- Someone who is passionate about education and creating educational equity.
 - Someone who cares about access to a world-class education.
 - Someone who cares deeply about social services.
- Someone who has a large circle of influence in San Diego and beyond.
- Someone who may be connected with a company that would be willing to invest human capital (in terms of mentors, community relations members or potential board members) or philanthropic donations.
- An alumnus of xxx.
- A local business owner, executive-level professional or entrepreneurial thought leader.

Key Messages

Key messages that should be presented at the celebration include:

- Why xxx invest at xxx
- Honoring the xxx tradition of supporting xxx
- The xxx campaign
- Rankings/Success stories

Staffing

xxx will prepare briefing materials, event timelines, and draft suggested talking points for event speakers. xxx administration will assist to attend to any administrative functions (name tags etc.) that need attention. xxx materials will be present for those interested in reading collateral materials.

Timeline of Event

5 pm	xxx staff arrive for set up and verbal briefings with the xxx
6 pm	Guests arrive, mingle, enjoy food and drink
6:30 pm	Hosts welcome guests; share commitment to xxx
6:35 pm	xxx (Leadership) welcomes guests, shares accolades of xxx
6:40 pm	Play xxx Promise video for context and emotional connection
6:45 pm	xxx alumna to speak
6:50 pm	xxx (champion) shares about initiative; encourages those interested to learn more
6:55 pm	Program concludes; the hosts encourage guests to enjoy the rest of the evening
8:00 pm	Event concludes; hosts and leadership thank guests for coming
9:00 pm	Event clean up; xxx staff leave host's home

Follow Up Activities

Development Officer to create strategies for attendees, with input from the hosts, based on conversations that occurred at the event. Highly individualized strategic touch points to follow for those who attended and those who sent regrets.

Potential strategies for follow up include:

- Personalized thank you note from the hosts and leadership, inviting them to stay involved through (event/program/tours/etc).
- Invite guests to natural partnership opportunities.
- Continue to engage in opportunities throughout the year.

Timeline Leading Up to Event

February 3	Finalize invitation for event
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February 10 Send invitations to 50 potential invitees

March 12 Confirm catering and any rentals

March 26 Event

April 4 Send thank you notes and begin follow up activities

Draft Invitation Copy & Follow Up Email

Dear Name:

We are hosting a reception at our home to showcase a cause we are very committed to: xxx. We became inspired by my parents, xxx, and their generous philanthropic connection to xxx.

This is an opportunity to learn more about what *Newsweek* has said is the number one most transformational school in the nation for three consecutive years. We'll learn about key tenants that make this school so extraordinary as well as hear from a student and alumna. (sample, put in your mission/success here)

We hope you will join us for this intimate event. Details are below.

Please contact us with any questions, or you may contact development officer at 555-555-5555 or email address. We look forward to seeing you there!

Sincerely,

Host Names

Host Names cordially invite you to join them for a reception at their home highlighting

xxx
and its inspiring students

Wednesday, March 26, 2015
6:00 – 8:00pm

Please join us and discover more about xxx and its mission of enhancing our community through education and social change.

Cocktails and hors d'oeuvres
Business casual attire

Please RSVP by March 17, 2015 to Development Officer
Contact Information

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SUCCESSFUL SALON EVENTS

January 28, 2016 | 1:00-2:30 p.m. EST

Additional resource: Host Overview and Expectations

Hosting a unique experience for others to engage with xxx

Opportunity:

Salon events are unique, personalized opportunities to showcase the great work being done at xxx and inspire philanthropic involvement in the campus. When someone generously offers to host a salon event, they are helping to bring awareness to the important teaching, research and community service the university is undertaking. They are making important connections between people who share a passion for higher education and those who have dedicated their life's work to higher education. They are starting the conversation about how partnership can help move the university's priorities forward and make a difference.

Role of the Host:

To be successful, a salon event needs a passionate, engaged host. Salon Event Hosts are typically already involved in the university, are knowledgeable and enthusiastic about a particular area of study, research project, or program on campus and are connected to other philanthropic community members who may also have an interest in investing in xxx.

Salon Event Hosts typically partner with the university to:

- Provide an event venue (home, country club, upscale conference rooms, or other intimate settings)
- Populate the invitation list and extend invitations
- Underwrite all or a portion of the event
- Share story or give brief remarks at the event
- Help with event follow up, primarily extending thank-yous to event attendees

Role of the Development Officer:

The development officer is responsible for overseeing all event planning components including staffing the event and event follow up. The development officer's primary responsibilities, in close partnership with the event host, include:

- Invitation list and invitation preparation
- Collecting RSVPs
- Event goals, key messaging and program design
- Staffing the host, academic leadership, students, etc.
- Introducing event guests to the speaker(s) and facilitate conversations with and between guests to determine their interests.
- Event follow up strategies and implementation

Thank you for your leadership, partnership and generous support of xxx!

SUCCESSFUL SALON EVENTS

January 28, 2016 | 1:00-2:30 p.m. EST

Additional resource: Planning Questionnaire

The following event planning questions should be covered with the salon event host:

1. What venue options can you provide to host the event? Are you available to do a walkthrough of the venue prior to the event? If not, are you comfortable with the development officer and/or special events staff taking the lead in the walk through? Are there any special requirements that we should be aware of (pets will be present, kids will be present, no wall space for visual projection, etc.)
2. Who from your circle of influence should be invited? Who from outside your circle of influence should we invite? Are there additional champions we should consider as co-hosts? Who do you know that can help us extend additional invitations to this event?
3. Will you be willing to review and approve the invitation language and when appropriate extend invitations personally (signing invitation letter, email from personal email, make phone calls)?
4. If invitations will be extended via phone would you like a phone script?
5. Are you willing to underwrite all or a portion of the event? If so, what specific costs would you be willing to cover (venue, catering, bar, parking, valet, etc.) If the donor is underwriter the cost of the event: Do you prefer to handle the event logistics yourself using your preferred vendors and suppliers?
6. What expectations do you have for food/bar/catering? (are there any restrictions? No red wine in your home, kosher, etc.)
7. What are the parking arrangements at the venue? Is valet needed? Are there neighborhood restrictions? Are there accessibility considerations?
8. Are there any other considerations or restrictions for the venue of which we should be aware?
9. Does your venue have A/V capabilities?
10. Are you comfortable speaking at the event? If so, what would you like to share – your story, a gift announcement, introducing university/academic leadership at the event, etc.? Would you like remarks drafted for you?
11. Do you want to schedule a briefing meeting prior to the event to go over event logistics, key messages, guest list, remarks, etc.?
12. Are you willing to participate in event follow up (Signing thank you letters, encouraging event attendees to take a meeting with a development officer, attending prospect visits, etc.)?
13. What can we do to ensure this is a positive experience for you?

Thank you for your leadership, partnership and generous support of xxx!

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SUCCESSFUL SALON EVENTS

January 28, 2016 | 1:00-2:30 p.m. EST

Additional resource: Best Practices for a Successful Donor Engagement Experience**Purpose:**

A salon event is an intimate gathering held in the home or private setting of an influential donor/volunteer/parent/friend who is connected to people who have the capacity to become supporters or has been a generous supporter/passionate champion for the institution/project. While the long-range goal of a salon event is to raise funds for a particular cause, the primary *purpose* of the event is to identify, incite passion and engage potential donors for that cause, and later, to cultivate them. At the same time, you are deepening the Host's relationship with the university by empowering him or her with ownership of the cause.

Approval Process: (customize for your institution)

If you believe a salon event would be an effective engagement tool to expand the prospect base and further engage a host, the following two steps need to occur before moving forward:

1. Submit a drafted strategy plan to your direct supervisor and the Associate Vice Chancellor for approval. The strategy plan must include specific goals or desired outcomes of the event. A salon strategy template is attached.
2. Have a preliminary commitment conversation with a prospective Host.

Best Practice Tips:

When determining an event date (or approximate date) check other university (xxx Master Calendar, College or Department Calendar, etc.) and community calendars to avoid conflicts.

When picking a date/time, it's also helpful to gain consensus from donors or alumni in the area you will be hosting regarding what days/times work best. For example, DC folks tend to work later and prefer events start later (i.e. 7-8pm), whereas San Diego or San Francisco may prefer that events start immediately after work (5pm) or on weekends.

Salon Event Planning Team: (customize for your institution)

Successful salon events demand great attention and dedicated time to plan and execute. Development officers should look to the administrative staff and/or event planners in their unit to provide support. Development officers should work with their admin/event staff to coordinate calendars to ensure there is plenty of time to plan the event. The following are average time commitments:

- The salon team should schedule regular planning meetings, even if just 15 minute check-ins, at least twice a month before the event.
- The Development Officer should plan on having the event briefing to the donor two weeks prior to the event.
- The salon event planning team should allot 1-8 hours total for the whole team) each week towards planning and preparation depending on the size and complexity of the event.

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- Development officers should dedicate 3-4 hours the day before the event and sometimes two days prior towards last minute planning such as receiving additional RSVPs, refinement of talking points, confirmations, follow up communications, etc.
- Frequent check ins with the host that increase as the event date nears, sometimes even daily emails and phone calls, to ensure the host is properly updated.

The Host

Ideally, your host is so passionate about the cause; he/she can not only discuss it with knowledge and enthusiasm but also has philanthropically supported the university, often the particular initiative featured at the salon event. The host should be willing to share his/her contact list to educate others about the cause.

A one-page Salon Event Overview/Host Expectations and Salon Event Planning Questionnaire are attached. These tools help facilitate a conversation with a prospective host, help answer key planning questions, and set expectations early on in the process.

Asking volunteers to underwrite the event (e.g. refreshments, beverages, equipment rental, valet, etc.), open their home, provide remarks, share their own giving story all make for great salon event enhancements. To facilitate a conversation about underwriting the event come armed with a drafted budget or estimate of costs. Event planners on our team can provide you with estimates to help you prepare for such conversations. Ensure your institution gift fee is part of the budget, especially if the department covers all the costs and the hosts write one check to the department.

Additionally, it is important to discuss with the host how his or her gift will be processed. Two common ways an event is underwritten include: 1.) the donor pays for event expenses up front and receives a formal letter from the university stating the amount they paid is tax-deductible. 2.) the university pays the bill first and then the donor can make a donation to cover the cost.

Best Practice Tip:

The development officer should determine early in the process how much the Host will underwrite, and whether he/she intends to handle all the arrangements or work with institution staff to manage the event. If the host does not plan to underwrite the entire event, is there the possibility of a co-host? (Note that if institution is planning/underwriting the event, event personnel should work with our preferred vendors.)

The Venue

Utilizing homes, country clubs, upscale conference rooms and/or other intimate settings provide the right setting for salon events. When choosing a location, one should consider the targeted audience, flow of the room and desired format for the event. Smaller conversations tend to work well in homes while larger facilitated conversations need more space. Determining the desired outcomes for the event prior to selecting location will position the event for greater success.

The following are things to consider when selecting a venue in partnership with the host:

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In considering room set up, considerations for whether the event will have a speaker with limited dialogue, or if you're looking for the event to be more Q and A/conversational will help dictate room set up. Crescent set up or farm style dining both work well when looking for a conversational background. Please take into consideration acoustics of the room to ensure that all guests can hear conversation without microphones. DOD and an event manager should set up a site visit with the Host I for a logistics walk-through:

- The space – how many people will it hold? Which rooms? Where will catering prep? Should furniture be moved, and who will move it? Are linens provided? Where will speaker(s) stand? How are the acoustics in the room? Will a microphone be needed? Will presenters have slides/video/audio or PowerPoint needs? Will it be outdoors and if so, what extra considerations need to be made (e.g. extra lightening at night, guests should bring a jacket, etc.)?
- Timing – event start and end times; arrival time for catering and UC San Diego staff.
- Catering – does the format of the program lend itself to a sit down dinner or hors d'oeuvres? Are the food choices appropriate for the audience? Are there any dietary restrictions or cultural norms to consider?
- Parking – are there neighborhood restrictions? Is a valet needed? Are there accessibility considerations?

Best Practice Tips:

- Salon events work best when time is given for reception style networking, presentations, Q&A and some additional networking time. It is also helpful to do introductions or passion enhancing statements in the opening so the group has a better sense of who is there and where opportunities for further networking lie.
- We need to be careful as a state entity, even when the event is hosted by others, that we do not look decadent or over-the-top.
- We will always have cancellations, so guarantees should be 10% under the number of attendees. We can always up our numbers, but we cannot lower numbers after the contracted final guarantee. Guarantee requirements vary from caterer to caterer and with hotels. Be sure you are aware of all and adhere to all contractual deadlines. For example, catering guarantees need to be in five days for an off-premise caterer and they tend to bring an extra 3%. Keeping these numbers in mind helps ensure that we do not pay for no shows. This is particularly important when we have someone underwriting event, as we want to show them fiscal responsibility on their investment.
 - Development staff may want to call respondents before the catering deadline to confirm attendance to strengthen confidence in the numbers submitted to catering.
- Plan a site visit with the host as soon as possible after it has been decided to move forward with the event. This ensures the event planning team is well aware of the event space and host expectations for the venue are set.
- A second site visit or conference call with the venue staff if outside Southern California should be scheduled at least one month out from the event date with the caterer, bartender/alcohol service, A/V media, lightening, etc. and then follow up again one week before the event to confirm details with key vendors.
- A final banquet event order (BEO) should be included in all briefing packets for staff. This way all staff are able to double check event details. On site, it is imperative to review the BEO with the lead banquet manager to ensure that all items that have been ordered are delivered. It is

also important to provide both the event lead as well as the facility planned timing for the evening so that food service delivery can be matched to the program. Discussions with the catering staff regarding food service during should not happen during the presentations – timing should be planned out prior to the event start.

- If bar service is to be included, determine ahead of time whether that should be ordered on a per person basis or based on consumption (BOC). Always compare costs of both to determine which is most cost effective. If the donor is providing the alcohol, and the group is more than the size of a dinner party, a bartender should be hired (Bar Works and Party Staff are two great vendors).
 - Please note: A campus alcohol permit is not required for off campus events.
- Usually audiovisual equipment will not be included in the BEO unless the event is at a hotel or country club. However, when working with a vendor that is a not a private home, in most cases and depending on the equipment needed, it is usually more cost effective to bring an an AV company rather than use the “house” recommended one.
- Name tags are recommended for all salon events especially when we are bringing alumni or friends who may not know each other but will want to network. This also assists staff in identifying guests.
- The final attendance list should be coded in your organizational database so that we have an accurate picture of who participated, as well as if there are no-shows.

The Invitation List and the Invitations

The development officer and the host will make a list of invitees, drawing mostly from the host’s circle of friends and acquaintances. Next, you will determine how best to extend invitations:

- One effective method is for *the host* to extend the invitation, ideally in person or on the phone, followed by a printed invitation or email. Another option is to send printed invitations with the host’s name on the envelope and then send a follow up email from the host’s email account. If this option is chosen, the development officer should asking in advance if they can work directly with an assistant directly to have emails sent from the host. Either way, the more personalized the invitation, the more effective it will be.
 - xxx will prepare the invitation, and if the host desires, a simple phone script.
 - RSVPs should be directed to a xxx staff person
- Another effective method is including volunteer leadership (e.g. alumni, board members, champions, faculty, etc.), especially if they are close to the host, in inviting key guests to the salon event. Some invitees may respond more favorably to invitations from fellow alumni/peers/etc. as opposed to development staff.
- Sample invitation language is attached.

The Program

The program is the key opportunity to make your case at the event and call your guests to action. Key messages during the program can include:

- Host story of engagement or personal connection to the cause
- Vision of the academic leadership
- Student or faculty story about impact of the program, initiative, research, etc.
- Share rankings, distinctions, etc.

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- Share new research endeavors and key findings
- Student stories – guests particularly enjoy hearing directly from students (undergraduate or graduate – who can speak to why xxx, their own personal stories, and the research/work they are doing)
- Share launch of a new program or initiative
- Why and how philanthropy makes a difference
 - Share impact of past giving to program, initiative, etc.
- Announcement of a gift

The host and development officer will determine the most compelling and approachable xxx representative(s) to briefly address the guests. The host usually has key insights into the guests that will help determine the best approach within the program.

The program should be no longer than 15-30 minutes, and may include a brief PowerPoint presentation and/or performance. The tone should be conversational (not a lecture), so that guests feel comfortable approaching the representatives afterwards.

Below is a sample program to consider:

- Host calls their attention, thanks them for coming, and briefly explains why she/he feels so strongly about the cause. Introduces faculty and/or student speaker. (~5 minutes)
- Faculty/campus leader briefly describes the cause, focusing on desired outcomes, and how individuals like Host have made more of the work possible. A direct appeal for support may or may not be appropriate, depending on the specific event strategy. (~5-10 minutes)
- In some cases, presentations of research, or philanthropic sponsored work is also of interest to guests (5-10 minutes)
- Beneficiary (student, doctor, etc.) briefly describes impact. (~5-10 minutes)
- Host thanks representatives and encourages guests to chat one-on-one with the representatives. (~3 minutes)
- Ensure you have time built in for questions, this is often the most powerful part of the event.
- Guests invited to stay and network with representatives.

Best Practice Tip:

- It is important to keep the program brief. In many cases guests will be standing, which makes it difficult to focus for a long time.
- All program participants should be staffed by the development officer (drafting key messaging, briefing packets, coaching on remarks, etc.)

Staffing the Event

The development officer is responsible for staffing the event. The development officer's primary responsibilities include:

- Staffing the host (briefing materials, key messaging, etc.)
- Help the host understand their role at the event, both in the presentation and networking opportunities
- Staffing all program participants (briefing materials, key messaging, etc.)

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- Introduce event guests to the speaker(s) and facilitate conversations with and between guests to determine their interests
- Designating someone to track RSVPs and collect business cards or contact information from all guests. This is an ideal opportunity to collect important information on those in attendance.
- Securing a gift to present the host at the end of the program. If there are children or dogs in the household, a popular option is to add Sprinkles cupcakes and “pupcakes” to the gift for the adult(s).

Best Practice Tip:

- Throughout the program and event, the development officer should be observing moments when guests take active interest, ask thoughtful questions, make meaningful connections with the host/speakers/academic and student attendees, etc. These moments should shape a personalized follow up plan and possible engagement strategy for the guest

The development officer and host also need to determine if staffing is needed for:

- A check-in table and/or greeter
- Nametags
- Coat check
- Distribution of gift bags or other takeaways (collateral, etc.)
 - Please note: It is a good idea to discuss gift bags/takeaways with host early on as you may need to order custom hats, water bottles, etc. which could take up to 6-8 weeks to order.
- A/V support and/or setup.

Follow-up Strategy

An overarching follow up strategy should be determined with the host prior to the event start. Ideally the host will be involved in the follow up messaging and help to secure follow up prospect visits/engagement opportunities.

One way to build on the immediate momentum of a salon event is to invite attendees at the end of the event to join the hosts for an on-campus engagement. For example, if the salon event was about music, have invitations ready for them to come to campus for a specific performance. If it was about Oceanography, invite them to an upcoming campus speaker event.

In addition to a personalized follow up plan for the top prospects identified or cultivated at the event, all guests should receive a thank you note from the development officer and/or the host. Follow up acknowledgments can also be sent by the program speakers or other academic leadership when appropriate.

Best Practice Tips:

- The first event follow up touch should happen within two days of the event.

- There should be a follow up plan for all invitees and should include a different outreach or messaging for attendees, no shows and “No” RSVPs
- All event attendees should be recorded in the system within one week of the event. All contact reports for significant conversations should be entered in the system within 4 business days of the event.
- It is important to code no-shows in the system. Not only with this help with identifying future invitation list, but it can help with playing guarantee roulette with the catering/banquet contacts.
- If a host gift was not given at the event, a personalized thank you/gift should be sent to the host immediately after.
- Staff leadership who attended the event to send a note of acknowledgement. Additionally, for high-level hosts, arrange for a note of thanks to be sent from high level leadership.
- Continue to keep host apprised of your event follow up and any key results (a new gift, a new volunteer, etc.). Share successes to demonstrate the impact of the event. Share challenges in connecting with people post event to see if the host can continue to help with engagement. Continued updates of your progress also demonstrates your and the university’s gratitude.