


SMALL DONOR CULTIVATION EVENTS

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 **LEARNING OUTCOME**

After participating...


...you will be able to take a strategic approach to intimate donor cultivation events.

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REFLECTION


“We keep moving forward, opening new doors, and doing new things, because we’re curious and curiosity keeps leading us down new paths”

~ Walt Disney

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AGENDA

- The changing landscape of donor cultivation
- Developing a strategy for small donor cultivation events
- Resourcing your efforts

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THE CHANGING LANDSCAPE OF DONOR CULTIVATION



DONORS ARE CHANGING

- Mission Driven
- Belief Focused
- Impact
- Shopping




■ DONORS ARE CHANGING...

OUR EVENTS MUST TOO!

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■ EVENTS OF PHILANTHROPY PAST

- Social in Nature
- Brought Supporters Together to Mix, Mingle and Hear about Mission
- Served as a Philanthropic Vehicle for Annual Gifts (Raise the Paddle Approach)
- Had Platforms that Rarely Changed
- Recognized Who was There
- Stand Alone

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■ **EVENTS OF
PHILANTHROPY
FUTURE**

- Cultivation Events with a Goal of Relationship Building
- Showcase Mission in Impactful Ways
- Interdisciplinary
- Suggests Transformation, Rather than Business as Usual
- Drives Action
- Utilizes Champions in Meaningful Ways
- Are Part of an Overall Strategy
- Have Outcomes, Metrics and Next Steps



■ **SALON EVENTS/
SMALL DONOR
CULTIVATION
EVENTS:**


WHAT ARE THEY?

- Unique, personalized and intimate
- Showcase the great work being done at the institution
- Inspire philanthropic involvement in the campus
- Bring awareness to the important teaching, research and community service the institution is undertaking




■ WHAT ARE THEY?

- Make important connections between people who share a passion of higher education and those who have dedicated their life's work to higher education
- Conversation starters for key philanthropic priorities
- Focus on the intimate, the special, the insider feeling
- Invite our donors and prospects in!



■ WHAT ARE THEY NOT?

- NOT a *Nice to Have*
- A wasted opportunity if follow up strategies are not in place



■ UTILIZATION OF
INTIMATE
EVENTS

- Re-engage/Re-energize Donors about Mission
- Connector of Passion
- Introduce a New Initiative(s)
- Showcase Strengths in New Ways



■ UTILIZATION OF
INTIMATE
EVENTS

- Test Ideas/Themes/Concepts/Messaging
- Glean insight to what motivates/inspires giving and what detracts from it.
- Moves Prospects from cold/lukewarm to warm/interested
- Introduces the “campus of today”



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DEVELOPING A STRATEGY FOR SMALL DONOR CULTIVATION EVENTS



■ SETTING GOALS/THEMES

- Portfolio Building/Qualification
- Volunteer Growth
- Participation Role Modeling
- Initiative Testing/Feedback Gathering
- Leadership “Like Us”
- Number of new Annual, Upgrade, Leadership or Major Gift Prospects



■ DIFFERENT
TYPES OF
CULTIVATION
EVENTS

- Home/Restaurant/Club/Office
- Labs
- Entrepreneurial Use of Campus Space
- Athletic Field or Arena
- Campus Cafeteria
- Library
- Historic Space
- New Space
- What's YOUR Hook....What will make YOU stand out?



■ CREATING
CONNECTIONS

- Common Donors
- Common Zip Codes
- Common Lines of Work
- Common Interests
- Past Gala/Event Attendees
- Other?



**BEST
PRACTICE
TIPS**

- Smaller Cultivation 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.




**SAMPLE EVENT
AGENDA - A**

- Host introduction
- Case(s) for Development (1-2)
- Q & A
- Networking




■ HOST INTRODUCTION

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)




■ SAMPLE MODEL

- Faculty/campus leader briefly describes the cause, focusing on desired outcomes, and how individuals like Host have made more of the work possible. (~10-15 minutes)
- In some cases, presentations of research, or philanthropic sponsored work is also of interest to guests (5-10 minutes)



SAMPLE MODEL

- Beneficiary (student, doctor, etc.) briefly describes impact. (~5-10 minutes)
- A direct appeal for support may or may not be appropriate, depending on the specific event strategy. (~5-10 minutes)




Q & A OPPORTUNITY
15-20 MINUTES

- Ensure you have time built in for questions from participants, this is often the most powerful part of the event

OR

- If testing a case, allow time for prescribed questions that will help determine what motives or demotivates giving.



■ NETWORKING

- Host thanks representatives and encourages guests to chat one-on-one with the representatives. (~3 minutes)
- Guests invited to stay and network with representatives.



■ SAMPLE EVENT AGENDA - B

- Host welcomes and thanks. Shares their motivation/personal story. (3-5 minutes)
- Move in to probing questions that provide passion building/ initiative ignition (majority of program)
- Leadership statement (3-5 minutes)
- Host thanks, calls to action, closes (3-5 minutes)



■ CORE
CONCEPT

- 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.)




■ BEST
PRACTICE
TIPS

- Creating impact at our events:
 - Vignettes
 - Stories
 - Story Boards
 - Music/Theatre Performance
 - Science on Display
 - Recipients of Philanthropic Support
 - Fire Starters!




POWERFUL PROBING QUESTIONS

- Rekindling The Fire
 - What is Your Connection to xxx?
 - What is Your Favorite Memory of xxx?
 - What was it like to attend xxx when you were a student?
 - What is your fondest memory from xxx?
 - What do you think of most often when you reflect on your time at xxx?
 - Where on campus did you spend the most time?



POWERFUL PROBING QUESTIONS

- Mission Focused Questions
 - Why do you support xxx?
 - What do you know about our programs? What would you like to know?
 - What do you know about xxx Campaign Plan or Strategic Vision?
 - What are your impressions of our impact on the community?
 - Do you believe we have a strong case for philanthropic support? If so, why? If not, why not?



POWERFUL PROBING QUESTIONS

- Campaign Focused Questions
 - As you think about xxx's ambitious goals for the future, which of our priorities do you think should be most important? How would you rank the others?
 - What do you consider our greatest strengths?
 - What do you think are our greatest opportunities?
 - What program or initiative do you think would transform who we are?




BEST PRACTICE TIPS

- 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



■ HOW DO WE CAPTURE FEEDBACK?

- Feedback is one of the greatest gifts of small, intimate events
- Ensure you have a point person to capture key themes, feedback, commitments and support statements
- Give thought to how this feedback will be incorporated in to future event plans, individual strategies and solicitations

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 **CHAT**

Utilizing Feedback: How Have You Effectively Used This Tool in Development Strategy?

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? QUESTIONS

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RESOURCING YOUR EVENTS

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■ ROLE OF HOST

- Provide an event venue (home, country club, upscale conference rooms, or other intimate settings)
- Help populate the invitation list and extend invitations

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■ ROLE OF HOST

- Underwrite all or a portion of the event
- Share story or give brief remarks at the event
- Help with event follow up, primarily extending appreciation to event attendees

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■ CORE
CONCEPT

- 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 institutional staff to manage the event.
- If the host does not plan to underwrite the entire event, is there the possibility of a co-host? (If on campus, are you required to work with preferred vendors?)



■ ROLE OF
CENTRAL
PROGRAMS

- Invitation template and invite copy preparation
- Research potential Invitees, provide suggestions and research on guests to unit
- Provide staffing support if requested (as appropriate) at event
- Provide sample follow-up/thank you templates to be customized by unit



**■ ROLE OF
DEVELOPMENT
UNIT**

- Final Invitation list
- Briefing Packet
- Event Timeline
- Collecting RSVP's
- Facilitating all gift in kind/gift paperwork/logistics/steps
- Gift to Host or Hostess
- Process thank you cards/letters as determined by lead



**■ ROLE OF
DEVELOPMENT
LEAD**

- Oversees overall salon event strategies for unit
- Event goals, key messaging and program design
- Staffing the host, academic leadership, students, etc.




■ ROLE OF DEVELOPMENT LEAD

- Introduce event guests to the speaker(s) and facilitate conversations with and between guests to determine their interests
- Determine event follow up strategies and implementation



■ CORE CONCEPT

- 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.



■ EVENT EXECUTION

- Make sure all volunteers/staff understand their role, is familiar with desired outcomes and understands next steps
 - Greeters
 - Assign 2-3 people per staff member, including key talking points
 - Information seekers
 - Stewardship
 - Sweepers



■ EVENT FOLLOW-UP

- Host debrief session to capture feedback and lessons learned (can be less than 30 minutes and even done via email)
- Code all attendees, including no shows in database
- Host versus staff/leadership
- Consistent messaging



■ **EVENT
FOLLOW-UP**

- Include next steps if appropriate
- Invite (personalized)
- Photos/Video/Other presentation links
- Update strategy/plan
- Keep host in the loop!




■ **EVENT
FOLLOW-UP**

- Reach out to No Shows so they know they were missed (can be a great opportunity to get a meeting!)
- Request a meeting when “no” RSVP’s come in
- We missed you messages
- Demonstrate impact through photos/event stories/event memento's
- Share key milestones as event result



BEST PRACTICE TIPS

- 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.

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BEST PRACTICE TIPS

- Continued updates of your progress also demonstrates your and the university's gratitude.
- Schedule your host and team debrief meeting(s) prior to the event itself so the debrief can happen within a few days after the event.

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EVENT METRICS




CORE CONCEPT

Metrics ensure everyone is focused on the same goal and creates unison about where time, talent, focus and discipline should be placed.




■ THE USE OF METRICS IN EVENT PLANNING

- Ensure events are forward thinking, and not “just because we have always done it this way”
- Promotes accountability across all areas of fundraising/development/advancement
- Invites and reinforces the role of campus leadership at events
- Provides important return on investment data

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■ THE USE OF METRICS IN EVENT PLANNING

- Builds an important awareness across service lines to needed tools to fully develop prospect relationships
- Serves as an education tool for our volunteers, and those we want to host events

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**EVENT METRICS
FOR FRONTLINE
FUNDRAISERS**

- New Initiative/Feasibility Study
 - # of prospects exposed to case/study over a set period of time
 - # of events held that include participation of leadership/deans/faculty/students
- Specific Portfolio Goals
 - # of new MG/AF/PG prospects identified per event
 - # of Face to Face meetings, Tours, Campus Visits, etc.



**EVENT METRICS
FOR FRONTLINE
FUNDRAISERS**

- Volunteer/Trustee Engagement
 - # of new Champions identified through a specific time frame
 - Number of invitees identified that are new to campus or portfolio



■ **EVENT METRICS
FOR DONOR
RELATIONS STAFF**

- # or % of customized follow up
- # or % of non-attendees followed up with (we missed you; follow up event invite; events synopsis/highlights/photo
- # of volunteers engaged in a strategic way (greeters, gratitude ambassadors; thank-a-thons)
- # of students/faculty/engagement vignettes included in event, or in post event follow up
- # or % of RSVP's (demonstrates strength of an engaged invite list)



■ **EVENT
METRICS FOR
VOLUNTEERS**


- # or % of Board Members/Trustees that host/underwrite an event in a given timeframe
- # or % of Board Members/Trustees who serve as speaker/champion
- # or % of volunteers who participate in peer screenings/



■ EVENT METRICS FOR CAMPUS LEADERSHIP


Tip: When working with Campus Leadership, Faculty or Physicians, these goals work best when set on an event by vent basis:

- Participation Goals (especially helpful when onboarding new leadership)
- Number of customized, intimate thank-you's sent
- Number of meaningful moves

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■ EVENT METRICS FOR THE COMMUNICATIONS TEAM

- Coverage of topical speakers in blogs, social media or campus magazine
- Photos from events utilized for other purposes
- Utilization of salon event feedback built in to case for support, stories, social media

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■ EVENT METRICS FOR ADMINISTRATIVE TEAM

- # or % of RSVP's that result in a future meeting or move
- # or % of RSVP's that include database updates or preferred method of communication from institution in the future
- 100% of attendee lists, no shows in database within 4 days of events



■ EVENT METRICS FOR DEVELOPMENT/ ADVANCEMENT TEAM


- Number of Salon Events across entire team over specified amount of time (by initiative area, or in total)
- Total number of new prospects/ qualified relationships over a specified amount of time.
- Number of upgraded gifts/planned gifts as a result of salon events
- Number of campus leaders/faculty/students engaged in salon events over a measurable period of time




 **CHAT**

What metrics would inspire accountability for your organization?




 **CORE CONCEPT**


Ensure that all metrics inspire **QUALITY** relationship building not **QUANTITY!** Your program will grow, or not based on how these goals are set.



SHIFTING THE CULTURE

- Ask for feedback on setting event metrics
- Ensure buy in by weighting metrics across service lines
- Treat event metrics with the same weight of accountability as other metrics (i.e., dash board reports; report out at team meetings, share out successes and opportunities;)
- Create debrief sessions so teams understand and adjust to key themes




 **RESOURCE**

Small Event Strategy Sheet

This resource outlines:

- Purpose of event
- When & where
- Key attendees
- Key messages
- Staffing
- Timeline of event
- Follow-up
- Communication example



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GETTING STARTED




■ GETTING STARTED


- Discuss Who Your Key Champions Are (think about those who ask “what else can we do for you?”)
- How Can These Champions Move Relationships/Initiatives/Strategies forward?
- Utilize Templates to Assist your Process; Customize for Your Style/Focus



GETTING STARTED


- Hold a strategy session to discuss how smaller donor events could propel a conversation/initiative/ask forward
- Build in to your advancement culture



 **RESOURCE**

Tools To Assist

- Host/Organization Responsibilities
- Planning Questionnaire
- Small Event Best Practices Check List





TAKEAWAYS

- Small Donor Events Are Critical Cultivation Tools, when Deployed with Thoughtful Strategy and Meaningful Follow Up
- Details Matter
- Utilize Host as a Partner
- Keep Program Simple, Focused
- Ignite Passion



QUESTIONS





EVALUATION

Thank you!

Please remember to complete the event evaluation. Your comments will help us continually improve the quality of our programs. -

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