

Instead of starting a new Special Event, start having these mission-centered small receptions that engage prospective donors with your key philanthropic priorities.



The Host Recruit a host or host couple who hold the event in their home as a reception or garden party (depending on the weather). The host role is as follows: 1) host the event in their home or at their club, including paying for the expenses. 2) Assist with development of invitation list and encouraging attendance. 3) During the evening, give a testimonial and deliver a call to action to the attendees. (A great host is someone whom you are cultivating for their own gift and who may decide to announce it at the event.)

Timing/Venue A weekday evening or Sunday afternoon in the host's home or at their club is best. If the venue and weather suit it, a garden party format works well but so does a reception inside, if the host has a living room large

enough for all attendees to stand and listen to the short talk. The event should not be a sit down (although you should have a few seats for older or disabled guests). Serve heavy hors d'oeuvres to be dinner for attendees. We recommend non-alcoholic drinks, beer and wine but you way want to serve cocktails, based on the customs or your area and organization.

Invitation list and attendance The ideal size for this event is between 20 and 60 people. Remember, these are potential leadership and major prospects, so you don't need hundreds of attendees they way a gala does. You want the event to have scale but not to be so big you and your organization's leadership can't get around and talk to everyone. These work best when you can get prospects to attend who are connected to your organization but who have not responded to attempts at individual meetings with you or your CEO. Many feel comfortable in a group setting and may then be open to hearing your message and agreeing to a follow up visit. Use your knowledge of what percentage of invitees will attend (or your yield rate for events). If you need to ask 200 to attend to net 20 do that. If you get 20 major prospects, the event is worth having. Start an invitation list with previous donors and others you know are connected to your organization. Add suspects you hope to engage and share that list with the host(s). Ask them to add names and which of the invitees they would be willing to reach out to personally. Build in that expectation of them helping with the attendance and follow up at the beginning. However, even the best of these requires follow up calls to yield a strong attendance (usually by philanthropy or foundation staff).

Mission-Centered Cultivation Reception

Format/Program for the Reception Below is an outline of the event that has worked in various parts of the country and in various venues.

- I. **60 minutes:** Arrival, Mix, mingle (check in at nametag table, someone on staff monitors percent of attendees who have arrived before starting program). Food and beverage served, philanthropy staff ensures that CEO, Dean, President or other leader meets targeted prospects before the speaking program.
- II. **15-20 minutes: Speaking Program** (We recommend against PowerPoint slides or videos, as you lose eye contact with attendees and change the tone of the event.)
 - a. **Welcome** by host(s): Hosts thank their guests and give their endorsement of the organization, stating why they are involved
 - b. **Speaker #1** (CEO, Dean, President) speaks on overarching mission and connects it to the next speaker
 - c. **Speaker #2** (Physician, Researcher or other leader in mission delivery) speaks on an exciting breakthrough, new program, success that is the focus of philanthropy program
 - d. **Thanks and Call to Action** by host(s): Host(s) thanks speakers, reinforces how important this program/research/project is to the community. Gives Call to Action such as, “We won’t be able to fully realize this exciting vision without philanthropic support. Sally from the Foundation is here tonight. When she and her team reach out, please take their call and consider a (tour/visit/meeting) and a gift to make this great program a reality.”
- III. **Coffee and Dessert/discussions/questions from attendees** Host(s) invites everyone to stay around for coffee and dessert and offers that speakers will be available for questions. Foundation/Philanthropy staff spend time asking prospects what they thought of the presentation and seek to confirm next steps.

Post Event Follow Up (The most important part of the plan) Before the event, schedule a follow up for 3-10 days post event with the CEO/President/Dean, Speaker and Host(s) to debrief on what they heard from the prospects attending. Keep the list of attendees on a spreadsheet/report with next steps and new gifts up to date. At regular intervals post-event, update the hosts on the impact of their event with statistics such as: a) new prospects engaged through their event, b) new funds raised from event attendees, c) who has agreed to host a similar event, etc.

(Of course, have CEO/President/Dean send a handwritten thank you to the hosts the day after the event.)

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