

HOW TO PLAN AN:

IN-HOME

DONOR

EVENT



CREATING A SMALL IN-HOME EVENT

AS A STEP IN THE DONOR EXPERIENCE

Organizations often get caught up in the excitement that might come with an annual gala, especially one that seems like easy money. Special attention must be paid to the event so that the time and energy being put into these types of well-meaning efforts balances with the amount of funding received. While there will be a time and place for these types of events, many gala-formats will not be successful without a portfolio of large donors providing lead or matching gifts. Because of this, leadership must remain focused on individual relationships with donors.

In fundraising, your goal is to provide customized donor experiences to your top donors on an annual basis. A small event model can become one of those steps to deepen their heart-tie to the mission of your organization.

Here we will look at three different types of in-home events that can be integrated into the organization's top 100 donor (or mid- and major-level donor) strategy as well as with their networks:

HOSTING AN IN-HOME EVENT MUST BE APPROACHED IN A VERY CONTROLLED MANNER. WHETHER YOU ARE SELECTING THE HOST, FORMING THE GUEST LIST, OR PLANNING THE EVENT ACTIVITIES, YOU MUST ESTABLISH SPECIFIC GOALS AND DRIVE THROUGH COMPLETION.



THREE TYPES OF IN-HOME EVENTS TO CONSIDER:

With any event, the goal is for donors of similar giving capacity to interact with each other – so a major donor should be invited to interact with other major donors and alternately, mass-level donors often attract others similar to their own giving ability.



ENROLLMENT EVENT

The goal of this event is to introduce the organization to many new supporters through a donor who already supports the organization. How do attendees want to plug in? Your goal is to target interested parties who are open to building new relationships with you and your mission.



CULTIVATION EVENT

The goal of this event is to cultivate and grow existing relationships, raise the donor's sights on the need of the organization, and set up a time for follow-up solicitations. Your goal is to identify how you can deepen the donor's heart ties to your mission.



SOLICITATION EVENT

The goal of this event is to introduce donors to the mission, potentially a specific project, and includes an “ask” with a targeted goal to raise in one night.

FOR THIS EXERCISE WE'LL USE:

SOLICITATION EVENT

Other than your passionate host, here's who might be in the room:

- > A few board members
- > Guests learning about the organization for the first time
- > Guests who know about the host's involvement in the organization
- > Executive Director, Development Director, and/or Program Participant



A CURRENT DONOR

The energy conveyed by a champion of your organization is infectious. The host must be prepared to give a coordinated endorsement of your organization.



WELL ORGANIZED

The host should be prepared to participate in a number of strategy and coordination meetings to ensure the evening's success.



TIME COMMITMENT

The pre-event and post-event work coordination will account for around 50% of the event's effort. The host must be able to commit time beyond the day-of activities.

SELECTING YOUR HOSTS

SETTING EXPECTATIONS EARLY IS THE FIRST STEP

The biggest mistake in selecting a host is not setting clear expectations about the level of activity which will be expected for planning, day-of, and follow-up tasks. It must be conveyed that they must:

- Understand the time commitment you are asking of them for pre-planning, day-of activities, and post-solicitation or follow-up help.
- Be part of the initial donor strategy and goal-setting for the event. The host must understand the desired type of individual with whom the organization hopes to create a relationship – this includes gift sizes you intend to solicit as a follow-up to the event.
- Be willing to articulate to the attendees why they themselves are supporters of the organization. Open to meeting with select guest ahead of time to discuss the sizes of gifts or goal the event hopes to make.

PRE-EVENT PLANNING

ACTIVITIES

We're digging into a Solicitation Event in this document. But you'll first decide what type of event this will be – whether Enrollment, Cultivation, or Solicitation. Next, lay out a master schedule so that all parties know the exact time commitment required of them and corresponding activities. You (not your host) must take the reigns here. The master schedule should include the 60-90 days leading up to the event as well as 30 days after the event is held. I always recommend you put all meetings (including the event date) on the calendar during the kick-off meeting. This provides the discipline needed in such an undertaking.

TIMING / 70-90 DAYS OUT

PREPARATION

Set internal goals early – what is the profile of the person you want your mid- or major-level donor to be?

Consider the structure of the 'ask' at the event – are you raising funds for a specific project? Will there be a need presented followed by one-on-one solicitations?

Create a few draft gift charts to express to the host the types of gifts you are hoping to receive as a result of the event.

TIMING / 45-60 DAYS OUT

MEETING #1 W/HOST

Express the profile of the person/couple you hope to have attend the event.

Share the gift chart options to open the conversation with the host about the guest's giving capacity.

Ensure the host is comfortable with the 'ask' at the event.

Draft the event's agenda and guest list to reflect the above details. Chart out the timing for the invitations to be sent and received back.

TIMING / 7-10 DAYS OUT

MEETING #2 W/HOST

Hold a strategic discussion of the accepted Guest List. Review each guest profile and do research where appropriate.

Create a final agenda for the evening's activities and schedule.

Remind and coach the host about the role he or she will play at the event to gauge interests of individuals

TIMING / 1-7 DAYS OUT

FINAL DETAILS

Support the host through the final RSVP process – touch bases regularly.

Practice your pitch!

Ensure you have as much contact information for each guest (from the host) before the night of the event. This will aid in speedy follow-up and thanking.

THE EVENT

HOST KNOWS BEST. BUT THE AGENDA MUST INCLUDE . . .

- A heart-felt pitch explaining the crisis your programs are attempting to solve along with how the donor's giving can change a life.
- An endorsement and a lead gift from the host
- A pledge card or a way to collect donor info
- Casual time to work the room before and after so that you can pre-sell and post-sell (answer deeper questions which might keep donors from giving)

THE TWO MOST COMMON WAYS TO APPROACH AN IN-HOME EVENT SOLICITATION ARE:



EVENT ASK + GIVE

Share the financial need or goal to raise as a result of the evening – use a gift chart to discuss the sizes of gifts you hope to receive

Make an ask – have a giving envelope or pledge card for each donor to fill out



EVENT ASK + FOLLOW-UP ASK

Share the financial need or goal to raise as a result of the evening – use a gift chart to discuss the sizes of gifts you hope to receive

Ask everyone to take your call/meeting when you contact them within the next 24-48 hours to discuss the type of gift or support they can give.



POST-EVENT ACTIVITIES

HOLD ON. YOU'RE NOT DONE YET.

DEBRIEF MEETING #3 W/HOST

Perhaps the most important meeting with the host is the post-event debrief. This is where you learn about all the side conversations and questions of which you may not have been fully aware. This is where the host's insight is key – after all, the host knows their connections more than anyone. Who seemed really interested? Who asked the most questions afterwards? Who was genuinely interested in learning more?

Depending on the structure of 'the ask' at the event, your days afterward can include deep follow-up and thanking as well as follow-up solicitations.

TIMING / 24-48 HOURS AFTER THE EVENT

FOLLOW UP

Create a plan to follow-up with everyone in attendance. Exceed each attendee's expectations with your thankfulness and promptness. If the event was set up to do follow-up solicitations – now it's your time to shine!



MEET UP

If the donor gave at the event, start to schedule cultivation meetings. Be a good listener – what do they want to do next? How do they see themselves becoming involved?



MAJOR-GIFT FUNDRAISING IS A DONOR-FOCUSED SERVICE WITH EVERY STEP ATTUNED TO THEIR NEEDS. ALL FUNDRAISING ACTIVITIES SHOULD BE FOCUSED ON DEEPENING RELATIONSHIPS AND NOT THE CONFRONTATIONAL BEHAVIOR THAT IS SADLY OFTEN ASSOCIATED WITH DEVELOPMENT.

STILL NOT SURE WHERE TO BEGIN?

GLAD YOU ASKED.

If you don't have a robust mid- or major-level donor plan in place that's ok.

Priority should be given to retaining current donors and cultivating relationships through deep and thoughtful thanking. This should even happen before entering the in-home event arena. The conversations with these donors should be casual yet provide an opportunity to clarify what their gift has already accomplished and what their future gifts can do. Enrollment or Cultivation events should be able to follow soon after you grow the reach and general donor file for the organization.

This is a marathon – not a sprint.

A realistic goal might be to host two of each style event within the next twelve months resulting in six connection events each year.

OUR SERVICES

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QuamTaylor helps Nonprofit Leaders who are ready to invest in leveling-up their organization to the next level, teaching them understand the tools and skills needed to perform activities that fund their missions every year.

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SIX MONTH INTENSIVE GROWTH & DEVELOPMENT COUNSEL

We'll spend six months of intensive time together working on development and organizational processes to position you to grow and streamline your funding. We'll create a custom Strategic Fundraising Plan and then roll-up our sleeves to methodically push through the plan together.



In my experience, it's rare to find someone who will not only develop a workplan and complete those goals, but also successfully adapt to the dynamic nature of the work and offer such comprehensive support.

- Blair, Executive Director

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THREE MONTH FUNDRAISING BOOTCAMP

We'll spend three months teaching you to streamline the processes that position you to grow. We'll work through key principles needed to strengthen your organization and then teach you how to solicit for gifts that will change your organization.



Sherry is an exceptional leader, listener, and teacher with a plethora of specialized skills...Sherry takes on projects as her own cause and is committed to accomplishing success for the organization's mission. These are remarkable and very unique traits.

- Anne, Executive Director