



Strategic Planning | Fundraising | Marketing | Talent Development

Turning Event Attendees Into Loyal Donors

Presented by Martha Mannarino





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As the spring event season is coming to an end and the fall season is just around the corner, this session focuses on turning guests who attend your events into loyal donors who are interested in supporting your organization in more transformative ways.

You will learn strategic steps to take before, during, and after the event that evaluate donor interests and awareness levels while moving them toward increased involvement and investment in your mission.

Goals

How to turn your event into a key part of your strategy to cultivate new donors and identify mid-level and major donors



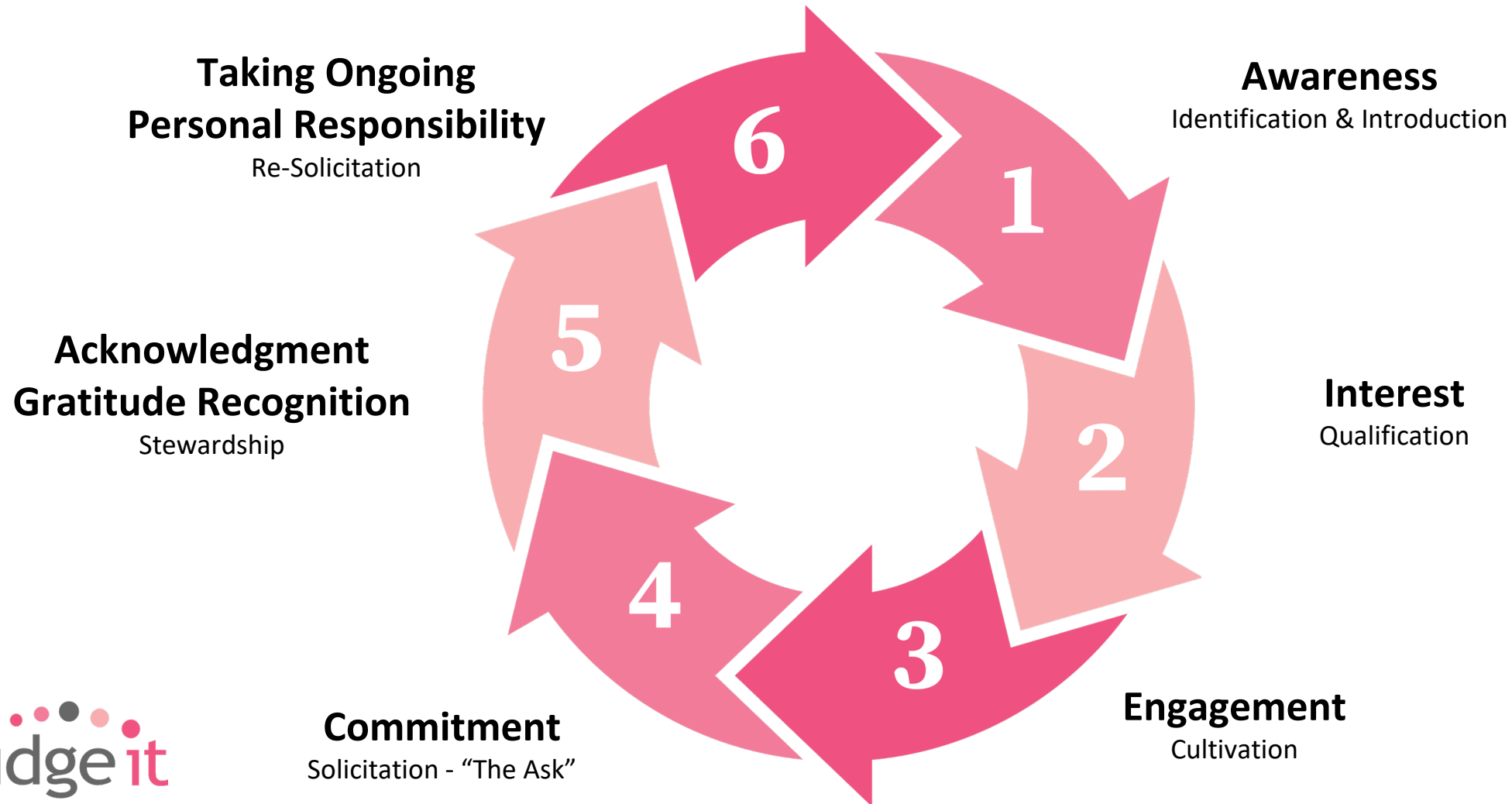
How to use relationships, donor analysis, and prospect research to maximize your event



Ways to strategically engage staff, board members, and volunteers in cultivation and stewardship strategies

Cycle of Involvement

Presenting People With an Opportunity To Help



It's As Easy As 1, 2, 3!

- 1. Pre-Event**
- 2. Event Time**
- 3. Post Event**

Pre-Event Planning

Getting the Biggest ROI

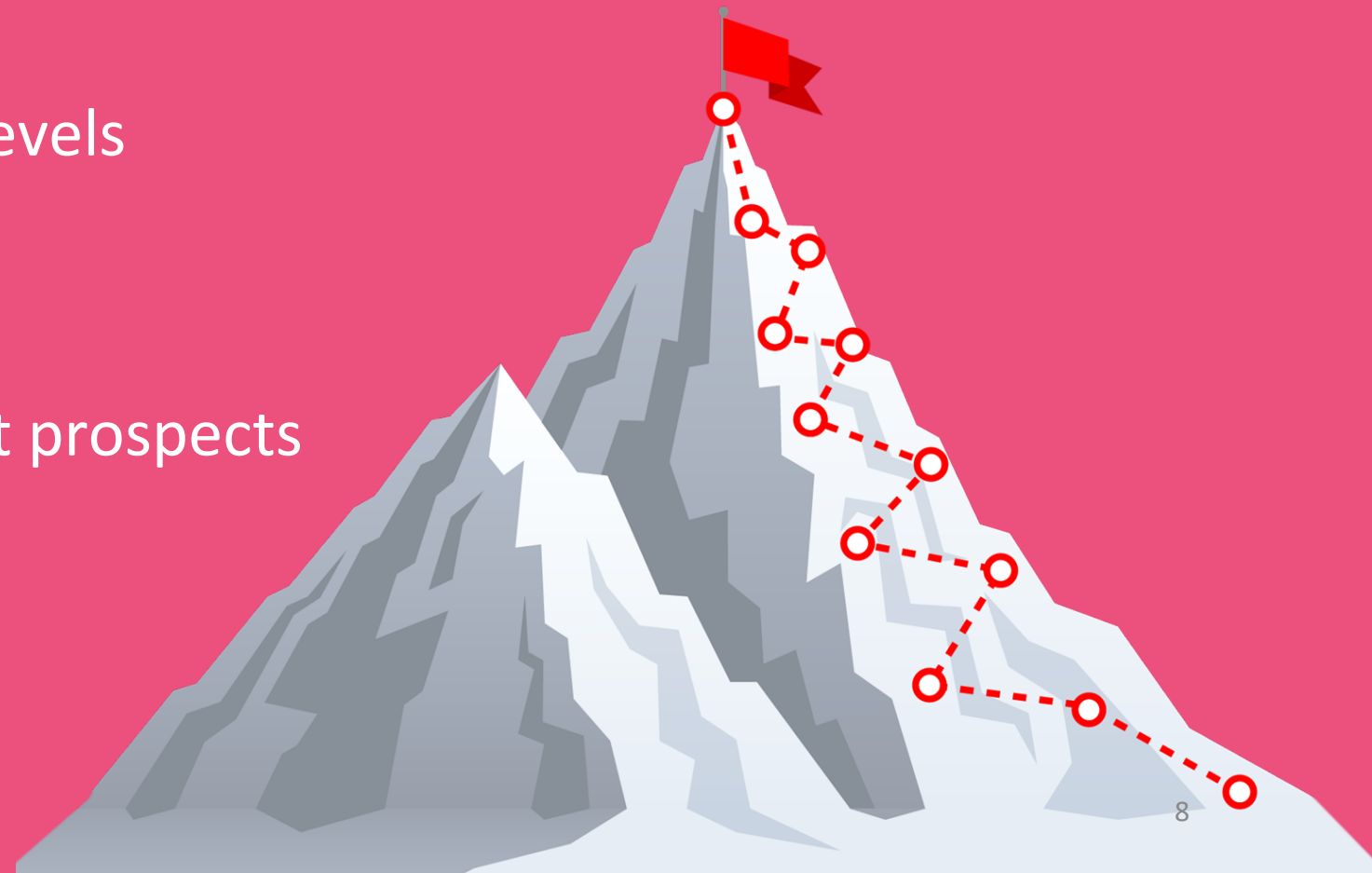
How Does
the Event Fit
Into Your
Development
Goals

Manage
and Analyze
Your Data

Identify
Guest
Prospects

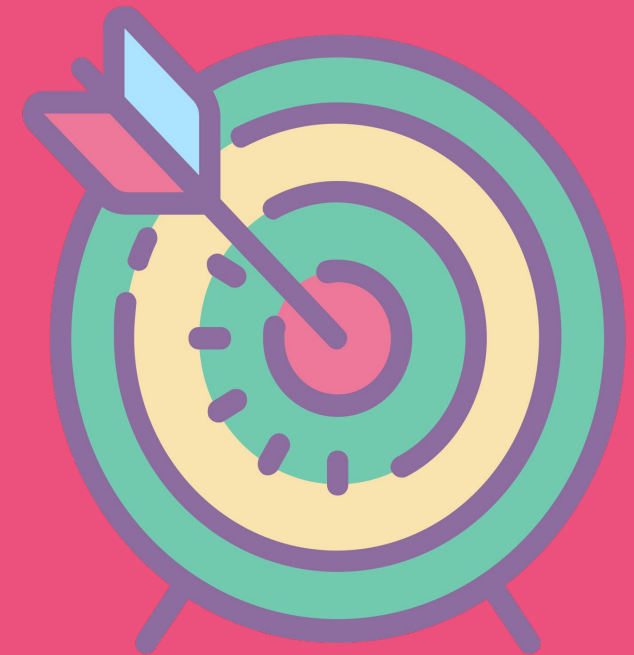
Special Event Goals

- Acquire donors
- Build and develop a donor base
- Renew donor support
- Move donors to higher giving levels
- Build donor loyalty
- Identify and involve leaders
- Identify and cultivate major gift prospects



How Do Event Goals Tie to Your Development Plan

- How much will an event raise/cost?
- How many new donors will you acquire?
- How many donors will you retain from last year's event?
- How many event guests are major gift prospects to be converted?
- How many donors and who will you move from annual fund to mid level and from mid-level to major gifts?



Development Plan



(Enter Year) Fundraising Plan

Focus Areas:

- Focus Area (1)
- Focus Area (2)
- Focus Area (3)

Overall Goal: Meet fundraising goals in all categories

Stretch Goal: Exceed total fundraising income by x% (\$XXX)

Strategy Focus Insert general strategy focus in this line		
Focus Areas	Tactics	Measurements of Success
<ul style="list-style-type: none">• Add in focus areas here	<ul style="list-style-type: none">• Add in obstacles here	<ul style="list-style-type: none">• Add in targets here

Event Checklist

TASK	RESPONSIBLE	START DATE	DUE DATE	STATUS
WORK BACK SCHEDULE				
create preliminary work back schedule	Julie	March 1, 2019	March 15, 2019	pending
review preliminary work schedule				
revise work schedule				
determine start/finish dates - for all tasks	Julie and Martha	March 15, 2019	March 20, 2019	
Analyze your attendees from the past and current				
Build a moves management strategy				
Create a cultivation and stewardship plan				
PROGRAM EVALUATION				
establish key success issues				
communicate key success issues to event team, volunteers, board and vendors				
BUDGET				
create budget				
budget forwarded to client for approval				
Include moves management strategies in your budget				
COMMUNICATION/MARKETING/MESSAGING				
Create a communications plan for the event and for individuals you are prospecting				
Develop agreed upon messaging for the event and for the individuals, corporations and foundations being cultivated and steward.				
INVITATION				
create invitation				
distribute invites to all				
EVENT ATTENDEE INFORMATION				
obtain list of attendees from client (attendees, corp staff, executives)				
REGISTRATION				
monitor complete/partial registrations				
follow-up on partial / unregistered				
EVENT STAFF (ONSITE)				
determine staff requirements				
confirm onsite staff availability				

Event Checklist

TASK	RESPONSIBLE	START DATE	DUE DATE	STATUS
EVENT SCRIPT				
outline event script(s)				
begin event script as information becomes available				
MATERIALS FOR ONSITE				
review list of items required onsite (office items, signs, name badges, menus etc)				
organize packing supplies				
VENUE - Venue Name				
contract negotiated and finalized				
set up master account				
list of all charges client wants posted to Master Accounts				
request final accounting needs in advance				
handle special requirements				
TRANSPORTATION				
LIMOUSINES				
negotiate contract/s and finalize				
generate arrival/departure manifest				
HOSPITALITY				
FOOD AND BEVERAGE - (Caterer Name)				
determine all F&B				
obtain menus and wine list				
select menus for event				
confirm menus with client				
venue deadline for F&B				
finalize menus & numbers - within 48 hrs of event				
FINANCIAL				
INVOICING				

Event Checklist

TASK	RESPONSIBLE	START DATE	DUE DATE	STATUS
deposit invoiced to client				
deposit received from client				
final invoice report to client				
VENUE PAYMENTS - (Name of Venue)				
deposit to be paid to venue				
balance of payment due for venue				
Follow Up--Post Event				
Send a general electronic thank you as soon as possible after the event with photos and links. Create this in advance and just fill in the blanks and send out asap afterwards. Sometimes it's good to do this as they are walking out the door.				
Thank, thank and thank more and do generally as a group for ease and then individually as much as possible.				
Update your punchlist				
Update your attendee list and include notes in moves management document				
Update stewardship and cultivation plans				
Work the post event moves management and cultivation plans regularly...don't forget and move on too quickly! This is a big strategy and needs to be worked effectively to give you the biggest return possible!				

Manage & Analyze Your Data

Identify:

- Past attendees
- Sponsors
- Volunteers
- Committees

Then, identify the categories within each group.



Prospect Categories

- Individuals
- Corporate sponsors
- Foundations
- Public officials
- Largest gifts to your organization
- Repeat guests & gifts
- Committee members & volunteers
- 1st time visitors, return and repeat
- In-kind sponsors and vendor partnerships
- Wish list



Identify Prospects

- Who do you want in “the room where it happens”?
- How do you get them there?

Prospect Questions & Research – Be Intentional

- Who could help further or fund your mission?
- Do you have organizational needs and prospects for helping?
- Are there foundations you want to thank or cultivate?
- Who are people in companies you would like to reach?
- Are there political figures who can help spread the word on your mission and keep you in mind when legislative issues arise?
- Think about awareness for new funding or partnerships or increased funding or partnerships.
- What relationships can you leverage for lowering expenses but still building on the experience?
- Other Questions?



Donor Research

- Wealth markers and philanthropic indicators
- History of charitable giving
- Connections to corporate philanthropy
- Relationships with existing constituents
- Preferred communication channels



Source: <https://www.donorperfect.com/nonprofit-technology-blog/fundraising-software/5-details-turn-event-attendees-essential-donors/>

**The world is moving so fast, and our
plates are overflowing with the
things we feel we have to do.**

**But all we really need to do is take a
day and sit down and think.**

—Maya Angelou

Making The Plans



Moves
Management

Messaging

Stewardship



Moves Management

		Prospect Information						
Priority	Action	Last Name	First Name	Donor Type	Description	Connection to Organization	Special Event Connection	Other Info

Moves Management

Financial Information									
Most Recent Gift	Date of Most Recent Gift	Total Giving	Lifetime # Gifts	Years Donated	Wealth Screeing Score	Estimated Wealth	Estimated Annual Gifts	Estimated Special Event Gifts	Estimated Major Gift Capacity

Discussion

Messaging



“What Role Do I Play?”

Wish granter, break giver, friend, or advocate ...

These are just some of the ways you can now answer the question Easterseals caregivers and friends asked you at

A Pair to Remember® -- “What role will you play?”

Since your outpouring of support filled the Grand Court at The Mall at Millenia, that energy has embraced people like Joe’s wife Nancy, who you met at the event.

Nancy says that for Joe, Day Break is HOME and for her, it’s the opportunity to take care of herself so she can be at her best for him.

Since your outpouring of support filled the Grand Court at The Mall at Millenia, that energy has embraced people like Joe’s wife Nancy, who you met at the event.

Nancy says that for Joe, Day Break is HOME and for her, it’s the opportunity to take care of herself so she can be at her best for him.



This month, we honor clients, like Joe, during

Older Americans Month and prepare for the start of camping season at Camp Challenge – **all because YOU said “yes” to the invitation to support.**

For that, we thank you.

Stewardship Plan

Category	Item	Due	Assigned To
Pre	Review guest list to identify top 30 donors for stewardship night-of		
Pre	Identify cultivators (i.e., Stewardship Committee) for personal touches		
Pre	Assign top donors to individuals for a personal "thank you" at the event		
Pre	Create a "Frequently Asked Questions" and "Directions + Parking" doc for guests		
Pre	Send FAQ and Directions document to all guests you have contact info for		
Pre	Re-send FAQ and Directions one more time to guests with pre-event eblast		
Pre	Review names you don't recognize from guest list; add in pertinent details from research		
Pre	Identify top people who need time with top leadership on night-of		
Pre	Create "Tier 2" stewardship list from guests you have researched		
Pre	Create talking points for night-of to share with stewardship volunteers		
Event	Key volunteers visit and thank individual VIPs assigned to them for the evening		
Post	Thank you calls from Executive Director, Board Chair, and key Board Members		
Post	Thank you letters sent to all attendees, donors, sponsors, etc.		
Post	Personalized email or handwritten note with an invitation to tour or meet		

Stewardship Concierge

This individual oversees the stewardship and cultivation plan at the event including the following:

1. Knowing all individuals involved in the process including the ED/CEO, DD, BOD, and volunteers.
2. Meeting individuals involved in advance and ensuring they have all cultivation/checklists for efforts at the event.
3. Working at the event and coordinating all stewardship efforts.
4. Connecting the appropriate individuals as the need arrives during the event.
5. Collecting all notes throughout the event and after to understand how the event cultivation and stewardship plan worked, complete analysis, summary, outcomes, and recommended next steps.
6. Report back to the team all outcomes and action items and help update the moves management document.

Discussion

I've learned that
people will forget what
you said, people will
forget what you did, but
people will never forget
how you made them feel.

—MAYA ANGELOU

You're at the Event, Now What?

The Stewardship
Concierge is Key

Execute Your
Stewardship Plan

How Do You
Know It's Going
Well?

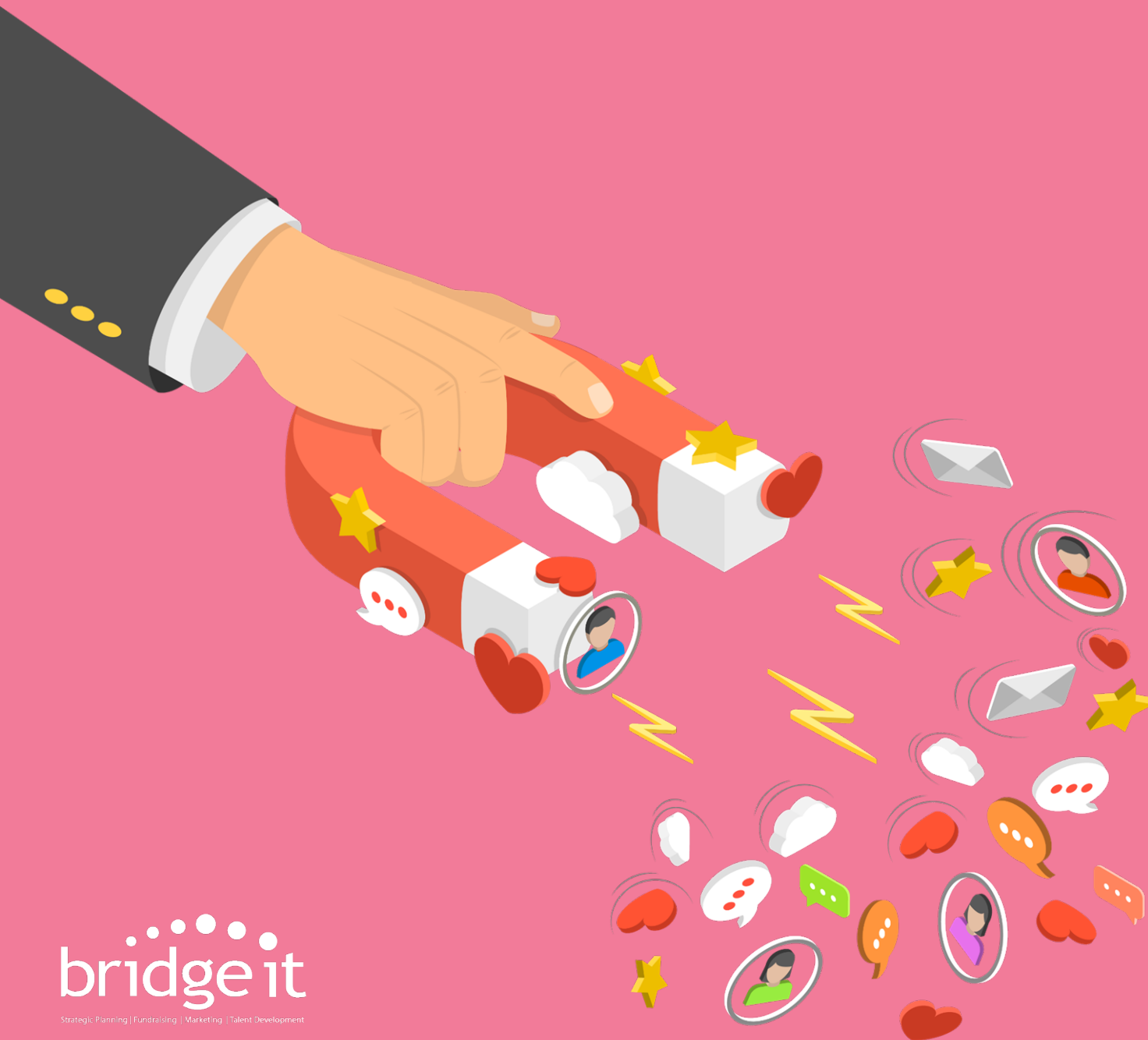
Activity

Post-Event:

Now the Fun Begins!

Post-Event: Gather Info

Gather info from key touchpoints who played key roles during the event



Post-Event: Moves Management



UPDATE

your moves management

Post-Event: Update the Stewardship Plan



Post-Event: Share Results





Post-Event: Reminders

- Remind donors they were there

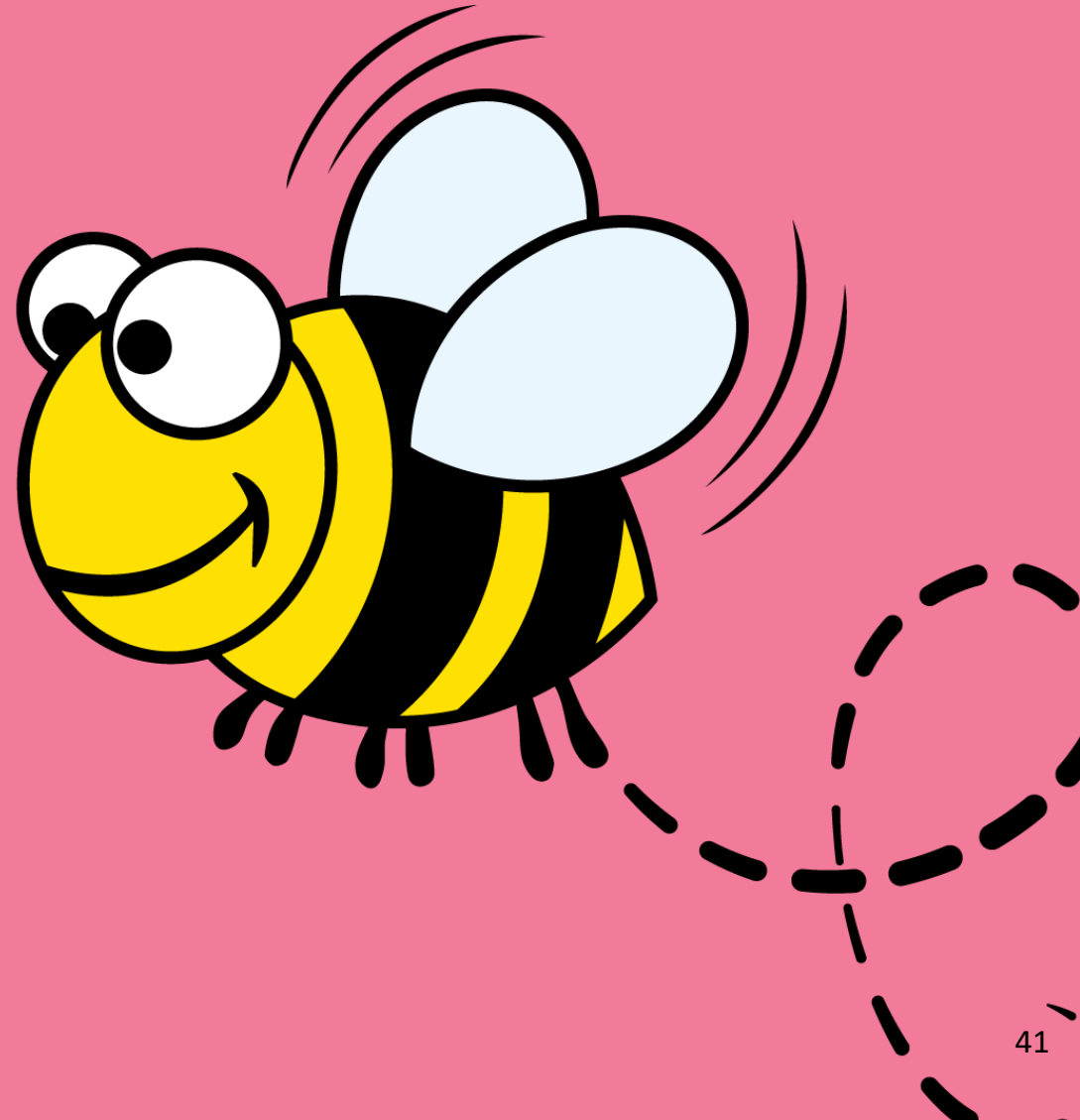
Post-Event: Invite

- Ask donors to get involved with you in other ways



Post-Event: Measurements

- Measurements...how did you do?



Wrap Up, Q&A, Aha Moments







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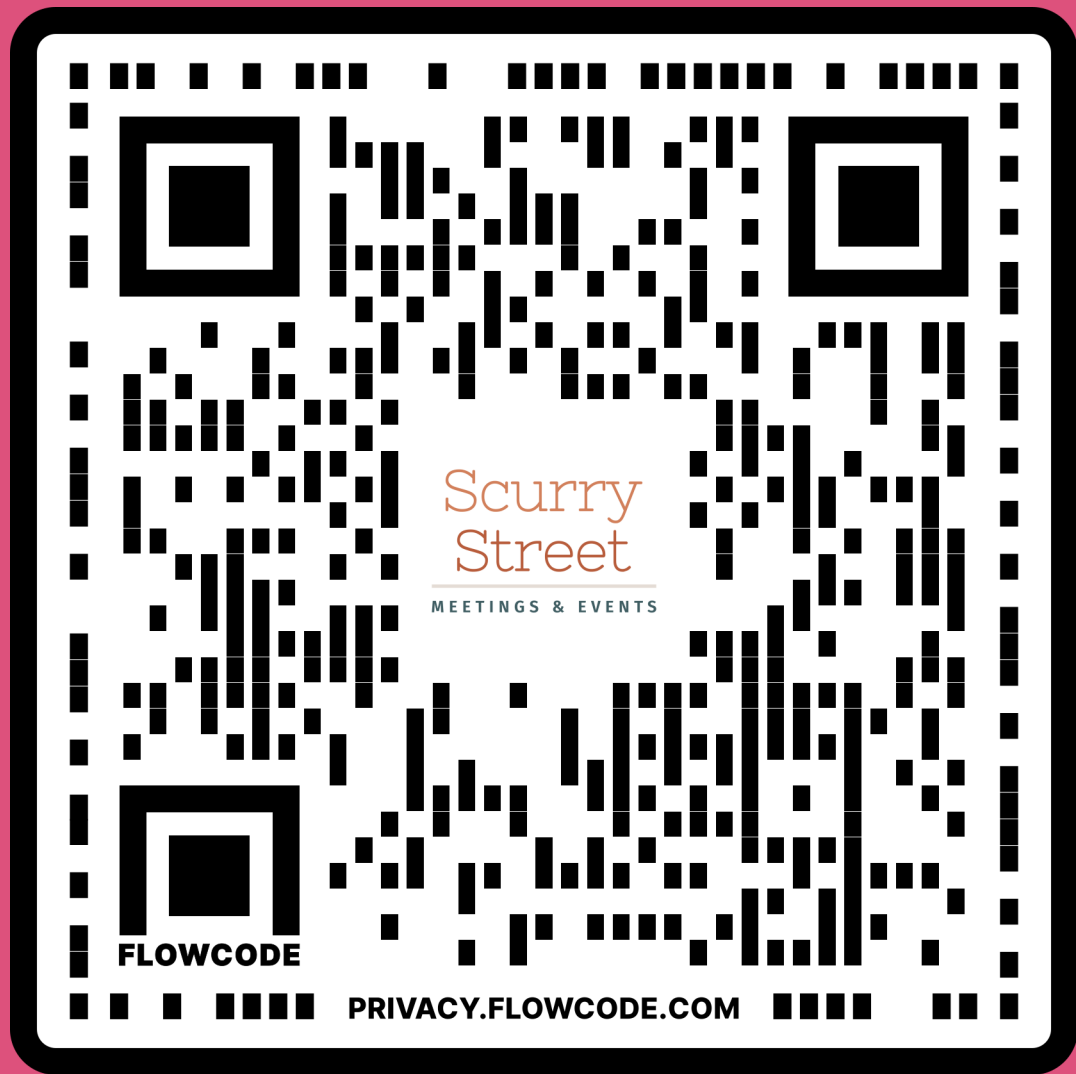
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www.Bridgeltco.org





Sources

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Eventplanningbuleprint.com

J. Wright & Co. @ <https://www.jwrightco.com/>

Hamilton, *In The Room Where It Happens*