

DONOR CULTIVATION

Creating High-Impact Events That Inspire

THIS GUIDE INCLUDES:

- *When, Why, and How to Design Cultivation Events You Can Repeat Again and Again*
- *A Proven Formula for Generating “Light Bulb” Moments that Donors & Prospects Won’t Forget*
- *Sample Events, Preparation Checklist, and a Script for Donor and Prospect Dialogue*

INTRODUCTION: EVENTS THAT DELIVER

It costs a lot to acquire new donors these days. But even though good stewardship—and the renewed giving it brings—makes fundraising cost less, the leaner organizations of today find themselves struggling to reach existing donors. And the toughest of all to reach are mid-to-major-level donors.

This guide will help you cultivate individuals who have either given mid-to-major gifts in the past, or whom you've identified as having that kind of capacity to support your mission. It will introduce a structured approach to designing and executing cultivation events that will get these key individuals involved in unexpected ways. Donors and prospects that participate in these events will come away with an unforgettable life experience—one that has immersed them in your mission and delivered that “light bulb” moment so necessary for moving them forward in the fundraising process. Because these events are fun, engaging, and educational, attendees will be talking up their experiences to friends and colleagues, and recommending future participants as well. And because they are repeatable—and scalable—your staff will find them a very efficient way to expand your supporter base.

Once you've identified the key prospects whom you'd like see increase their level of support, ask yourself how you can help them experience that “light bulb” moment that leaves them with a clear appreciation of what your organization accomplishes, and why.

► Don't Forget

The process of cultivating loyal donors takes time. Often plans for end-of-year campaigns are well-formulated, but what about the rest of the year? Consider planning mid-year touch points before approaching prospects with an end-of-year ask. Maintaining consistent interactions with supporters year-round is key to a good stewardship strategy.

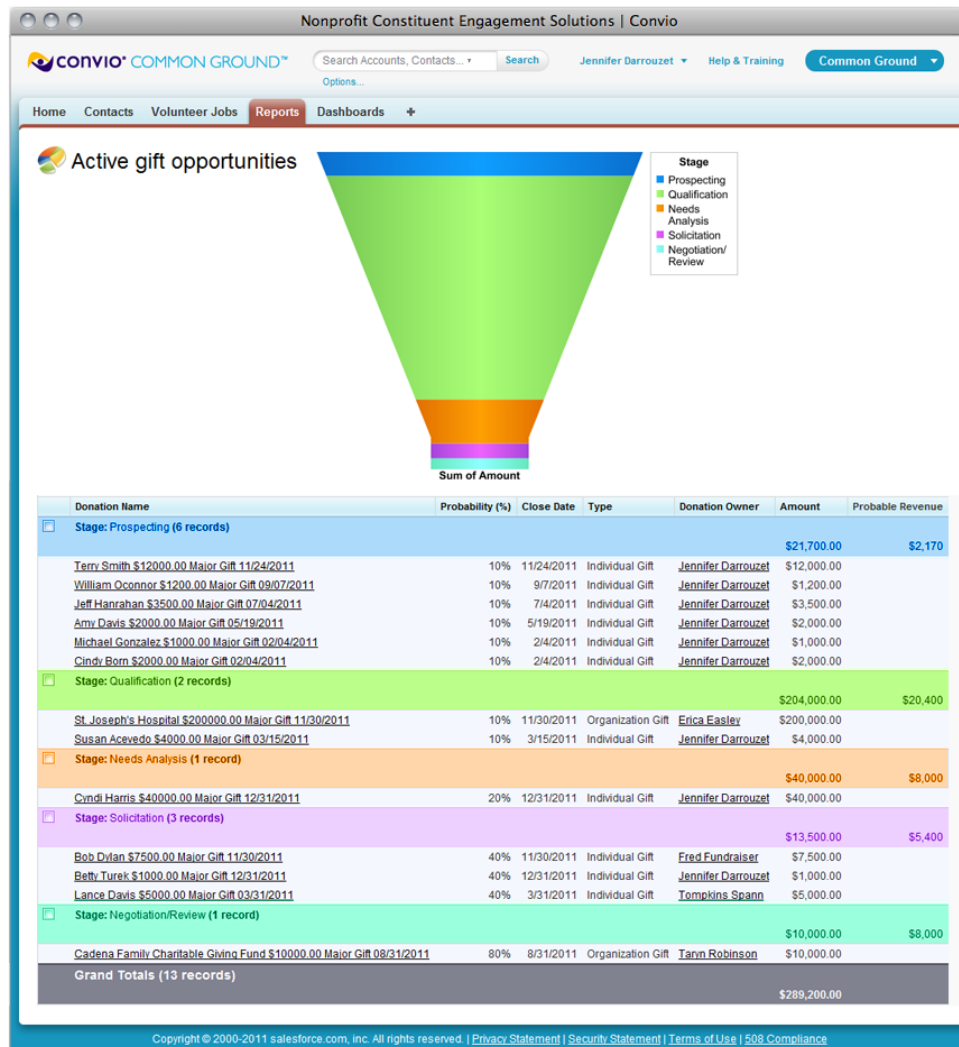
How do you know if such a cultivation event is right for your organization, right now? If you were to pull a report, as we have below, of donors who gave last year but haven't yet this year, could you name the last time you interacted with them? Maybe they weren't able to make the banquet this year. Open houses fell on the wrong weekends. If it's been months since you interacted with them, act fast! They need cultivation **now**—mid-year, before it's suddenly back-to-school and Thanksgiving, and then their calendars are once again booked solid.

Consider what a 25% increase in your donors' giving levels would mean to your organization. And consider what a 50% decrease would do instead. The time to plan for a successful end-of-year fundraising season is now, and if you, like many organizations, are struggling to cultivate your donors efficiently and effectively, this is the guide for you.

Account Name	Last Year Transaction Amount	YTD Transaction Amount	YOY Increase	25% Upgrade	50% Downgrade
Account Name: Carlos Lacy Household (2 records)	\$1,030.00	\$0.00	-1,030.00	1,287.50	515.00
Account Name: Charles Conover Household (8 records)	\$1,025.00	\$8,775.00	7,750.00	1,281.25	512.50
Account Name: Darren Demar Household (1 record)	\$2,000.00	\$0.00	-2,000.00	2,500.00	1,000.00
Account Name: Eric Martinez Household (2 records)	\$2,750.00	\$0.00	-2,750.00	3,437.50	1,375.00
Account Name: Evan Todd Household (2 records)	\$9,500.00	\$0.00	-9,500.00	11,875.00	4,750.00
Account Name: Frank Sousa Household (2 records)	\$2,530.00	\$0.00	-2,530.00	3,162.50	1,265.00
Account Name: Henry Park Household (2 records)	\$1,030.00	\$0.00	-1,030.00	1,287.50	515.00
Account Name: Jeffrey Robinson Household (3 records)	\$2,060.00	\$0.00	-2,060.00	2,575.00	1,030.00
Account Name: Joe Scott Household (1 record)	\$2,500.00	\$0.00	-2,500.00	3,125.00	1,250.00
Account Name: John Remis Household (4 records)	\$2,350.00	\$200.00	-2,150.00	2,937.50	1,175.00
Account Name: Lester Patway Household (1 record)	\$4,500.00	\$0.00	-4,500.00	5,625.00	2,250.00
Account Name: Mark Reitz Household (2 records)	\$2,250.00	\$0.00	-2,250.00	2,812.50	1,125.00
Account Name: Robert Nixon Household (1 record)	\$7,500.00	\$0.00	-7,500.00	9,375.00	3,750.00
Account Name: Rutger Williams Household (3 records)	\$2,000.00	\$200.00	-1,800.00	2,500.00	1,000.00
Account Name: Steve Lee Household (1 record)	\$5,000.00	\$0.00	-5,000.00	6,250.00	2,500.00
Grand Totals (35 records)	\$48,025.00	\$9,175.00	-38,850.00	60,031.25	24,012.50

In this report, red highlights where a major donor has given less than last year; green where this year's gift exceeds last year's. The organization does a quick calculation (column highlighted in teal) to determine what they could raise from these donors this year, if careful stewardship were able to upgrade them by 25%. The column in brown helps them prioritize their efforts, as it projects what would happen if donors downgraded their support by 50%.

This is also the guide for you if you are in charge of identifying new prospects, and predicting their futures—without a working crystal ball. Your team can see the end-of-year giving crunch looming around the corner, and you don't see how you can cover all the ground you need to cover in the time left, with current staffing. You need a strategy that can maximize giving from the list you've identified, whether by increasing the likelihood of a gift, or increasing the amount of support.



This report is summarized by stage, from gifts just at prospecting, through the ask and any final review. If a gift's stage is advanced, it's because the likelihood of a gift has increased. Multiplying an estimated amount by the probability the gift will be made can help you forecast your fundraising. If the totals do not deliver what you need, invest in efficient and effective cultivation to help further these gifts' stages and amounts.

HIGH-VALUE VOLUNTEERING EVENTS

High-value volunteering events are a popular type of cultivation event because they appeal to mid-level and major donors and prospects, and because they deliver remarkable results. Essentially, people who can provide high-impact support (both existing donors and prospects) are brought in for high-level mission interactions—essentially service experiences—that will leave them feeling emotionally gratified and connected to your mission in ways that mix-and-mingle events too often can't. The target audience is ideally suited to serve in high-value roles, often having skills and professional experience that are in great demand in the community. Creating a successful event of this kind is a multi-step process. Let's look at the who, what, where, when, why and how of putting together a high-value volunteer event.

► Here's An Example

John is the CEO of a local business specializing in website design. A local youth empowerment group asks him to volunteer on a panel, judging summer-camp websites designed by teams of at-risk youth. Each team has chosen an obstacle they face and completed research on local community resources available to them to include on their websites. John is particularly impressed by a pair of young women who tackled a tough subject they and their younger siblings had experienced: "When you're hungry, nothing else matters."

At the end of the morning, he returns to work and shares their website with his employees. He talks about his morning with his family at dinner and with friends on the weekend. And after a call from the group asking how it had gone, he and his wife send a personal check—enough to pay for generous nutritious lunches for the camp for the entire summer.

WHO: The Most Important Part of Your Activity Is Your Intended Audience.

First, define your audience. Start with a list of mid-major donors needing cultivation, and their top one to three reasons for supporting **you** versus other available community organizations. Identify common passions, and compare this with your prospect list and your strategic initiatives. It's better to address the needs of one segment really well (for example, designing an event that engages those with a keen interest in aging issues), instead of making something generic (trying to span everything from early childhood development to aging issues).

Consider diversity in your intended audience. A big side-bonus for attendees is networking with others they wouldn't have met otherwise. Can you include an elected official, an entrepreneur, a retired teacher or medical professional, a student or professor engaged in original research, a local religious leader, or program alumni?

► Best Practice

Check out local employers who publicize their employees' accomplishments serving the community. Some will have “paid time off” policies that allow and even encourage time away from work spent volunteering. Referencing such policies and projects can remind your target invitees that time away from work—especially time that makes them more visible volunteering in the community—is positively encouraged.

WHAT: The Volunteer Task to be Accomplished (And It's Not Grunt Work!)

When deciding on the actual content of your volunteer event, think more of the impression the experience will leave on your donor than the immediate benefit to your organization. In other words, you don't necessarily want an activity that will deliver value to the organization today (like stuffing envelopes or moving boxes). You do want something that may take a few days or weeks to “sink in,” while the volunteer processes the raw, real-life experience. For example, a major donor who came to see an after-school science program in action watched in awe as a veterinarian spayed a cat; she was as fascinated as the kids: “I'd never seen real ovaries before!”

If you can, take advantage of the combined expertise of the audience you assemble. You probably ask your donors often for gifts, but how often do you ask for their opinions or advice? A school assembled a “dream team” of local technology leaders, who were tasked with envisioning a new computer lab. They were asked to propose a layout, equipment set, and create a budget for the lab. But they were also asked to use their knowledge of industry trends to imagine what the school might need 3-5 years into the future. Asking potential donors to contribute their unique expertise can make them feel needed and appreciated, and in turn more likely to give. Plus, it would probably cost you hundreds or thousands of dollars if you were to pay someone of their caliber for such consulting services.

Ask yourself these questions when choosing the activity to be performed at your cultivation event:

- How can we involve face-to-face interaction with program recipients?
- What is a curriculum or presentation topic that has given staff presenters the biggest goosebumps when program recipients really “get” it? (Presumably volunteer “assistants” would have a similar experience...)
- If we assemble an audience of clients / students / etc., how can we prepare them best to be thoughtful and listening, with appropriate questions?



Donors who see the impact of their gifts in the eyes and smiles of program recipients may never forget the feeling, and may share the experience with friends, family, and colleagues for years to come.

- How can we prepare the staff / board presenter to keep the dialogue going, including the volunteer assistants? (And which staff/board presenter would be the best?)
- How can we prepare our volunteers, so they feel confident and supported throughout the entire experience? (Be sure to include a key impact statement about the activity they'll accomplish before and after the event. For instance, tell them, "90% of middle school students who sign a commitment to attend college actually do," before they role-play as college admissions counselors and witness students' contract-for-college signatures.)
- How could this real-life situation turn awkward? (How could we avoid that?)
- How can we get photographs / video of this event for future use?

Still stumped for selecting an activity? Get hands-on project ideas by scanning through summer camp guides, at-home science experiment books, informal class and small business training lists. Consider events where you've previously collaborated with local city or county representatives. If a well-known author, musician, journalist, or dignitary will travel to town soon, volunteers could welcome the visitor. If you battle misperceptions around your cause, hold a "myth-busting" presentation. Ask your board what program experience has made them feel most proud to be a part of your organization.

WHEN, WHERE & HOW: Setting the Stage for a Seamless Event

Time and location can make or break your event. You will get more attendees by keeping the event to no more than two hours. Having flexible options, like the ability to drop in and be part of a 30-minute activity versus staying and experiencing an exercise with a class, can allow attendees to self-select their time investment.

Mid-year is an excellent time for cultivation and stewardship events, because social calendars are typically lighter than during the end-of-year holiday season. Certainly avoid weeks including Independence Day and Memorial Day, or weeks when students begin attending local universities. Ask staff, board, donors, and prospects about summer vacation plans, because they'll enjoy discussing them and because you can plan for when a majority will be in town.

For many, the best location will be your own facility, where you can control the experience top-to-bottom and ensure "white glove" treatment throughout the event. "In-the-field" events—at a fire station, local public school, day-labor site, or even sea-turtle hatching ground—can be very effective but require a lot more preparation. The most important consideration may be convenience to your intended volunteers, though. If many work downtown during the day, you may get the biggest bang for your buck by having a board member host a lunchtime activity in her law firm's biggest conference room.

Be sure you can provide:

- Hassle-free, safe, complimentary parking
- A well-labeled and visible check-in station, staffed with plenty of upbeat greeters and an executive or board member to make introductions
- Restroom facilities and a secure place to store purses, notebooks, mobile phones, and the like
- A "ready room" with food and beverages (so attendees can come straight from work or return

straight to work) and comfortable seating for pre-event briefing

- A meaningful welcome, with a high-level introduction to your organization and a brief orientation for the activity
- An activity or presentation room with comfortable seating, all necessary supplies, and a photogenic background (set the stage with mission-related content if possible)
- A well-prepared audience, supported by knowledgeable staff, so that you can ensure the quality of your guests' experience and be able to respond "in the moment" to your guests' often more-than-casual questions

Begin planning your event six to twelve weeks in advance, so you can plan around staff and board vacation schedules, etc. If you can, plan to host a series of fairly "cookie-cutter" events (this is recommended to most efficiently expand your circle of friends!). Plan on one staff or board member for every four high-value volunteers (successful events typically involve no more than 20 VIP guests), PLUS whatever staffing you would need to chaperone children or supervise program recipients normally. Avoid Monday mornings, as people dive deeply into their weekly duties then; however, Friday afternoons can be quite effective. Weekends can work if few of your intended volunteers have children at home.

By far, the best way to invite your intended audience is through personal connections. Draft a letter or email that your board members and other dedicated fans can send to target individuals, or provide talking points for a phone script. Ask for an RSVP via email, phone, or online form, and confirm via email, including a map and parking plus in-case-of-rain instructions. Call with a reminder two to three days before the event. Ensure your main telephone line is staffed for last-minute questions on the day.

The best place to track the work necessary to host your event is in an integrated database—one that holds the master records of all donors, their gifts, and prospects, but also of volunteers and what they've done for you. Why? Well—most importantly—the donors and prospects who volunteer at such events would be disappointed if record of their service went missing. If a future staff member ever says "it looks like you haven't volunteered with us before..." that donor or prospect will be thinking that most dangerous of thoughts: "You don't know me, do you?"

But also, the event will be less efficient and effective for your staff if you can't manage all your data in one place. A recent study¹ found that 67% of volunteers give money to the same organizations where they volunteer, so there's just too much redundancy otherwise. If you learn a donor can't volunteer because she spends the summer season at a second home out of state, that information belongs in your donor database. So does her relationship to another invitee. If a prospect says he serves on the grants committee at work, and volunteers to help review a grant application, you need a place to track those hours. And if any attendee turns out to be an unexpectedly good public speaker, that's valuable data as well—data that can help you maximize community support in many areas. If you aren't working with an integrated database that can accommodate unified data, take a look at Convio's Common Ground™ database.

¹ Fidelity® Charitable Gift Fund and VolunteerMatch, December 2009.

The Payoff

The worst thing you can do is invest in a well-attended, mission-validating event that knocks everybody's socks off—and then go back to your desk and dive into your standard daily duties. That would be like preparing a delicious and nutritious meal, and leaving it for ants to slowly carry away.

Make sure you track outstanding tasks related to each attendee on a master contact record. As the event gets closer, check off the tasks—like reminders, etc.—and note any questions or feedback from the donor

The screenshot displays the Convio interface for a volunteer job shift titled "Stomp Out Obesity Workshop: 08/19/2011, 13:00 - 16:00". The interface includes a search bar, navigation tabs (Home, Contacts, Volunteer Jobs, Reports, Dashboards), and a detailed view of the job shift. Below the job shift details, there are three main sections:

- Volunteers Assigned:** A table listing assigned volunteers with columns for Action, Contact Shift ID, Contact, Account to Credit, Status, Attended, Credit Hours, and Number of Volunteers.
- Open Activities:** A table listing tasks with columns for Action, Subject, Name, Task, Due Date, Status, Priority, and Assigned To.
- Activity History:** A table listing completed tasks with columns for Action, Subject, Name, Task, Due Date, Assigned To, and Last Modified Date/Time.

At the bottom of the interface, there is a copyright notice: "Copyright © 2000-2011 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance".

Here, the organization tracks event invitations & sign-ups as they would for any other volunteer job. You can see who all has been invited, who signed-up, and how many will attend. Below are the activities, whether board member outreach, or direct email or phone contact from the organization, that have been completed to fill the event, along with open activities still underway. Board members who will attend in support of the event are included here, as are several other logistical volunteers. Be sure to track all attendees' hours so they are properly credited for their service.

or prospect. Then, after the event—instead of diving back into your daily routine—think about your event as part of a larger cultivation plan. The post-event dialogue should remain open and assigned until it is conducted, and a report on these interviews should be part of any ROI analysis on any event. Especially because the discovery process that is part of this dialogue will lead you to assigning the right next-steps for this donor or prospect as you progress them forward in their philanthropy.

The screenshot displays the Convio CRM interface for a contact named Mr. Darren Demar. The interface includes a navigation bar with options like Home, Contacts, Volunteer Jobs, Reports, and Dashboards. The main content area shows contact details, a list of donations, and a detailed view of open activities.

Contact Detail

Name: Mr. Darren Demar
 Nickname: Darren
 Account Name: Darren Demar Household
 Active:
 Lead Source:
 Primary Classification:
 Head of Household:
 Anonymous:
 Contact Owner: Shared Admin [Change]
 Description: This record is test data. Feel free to add donations to test the system using this record. This record and any associated donations, relationships, and household accounts will be deleted by the cleanup script, so feel free to experiment.
 Supporter Center Access: [Send access email](#)

Donations

Action	Donation Name	Account Name	Donor	Donation Record Type	Campaign Name	Stage	Close Date	Amount	Online Form
Edit Del	Darren Demar \$2000.00 Single Donation 08/10/2010	Darren Demar Household	Darren Demar	Single Donation	2010 Annual Fund	Received	8/10/2010	\$2,000.00	
Edit Del	Valerie Demar \$30.00 Single Donation 02/04/2007	Darren Demar Household	Valerie Demar	Single Donation	2007 Annual Fund	Received	2/4/2007	\$30.00	
Edit Del	Darren Demar \$60.00 Single Donation 08/31/2006	Darren Demar Household	Darren Demar	Single Donation	2006 Annual Fund	Received	8/31/2006	\$60.00	

Open Activities

Action	Subject	Related To	Task	Due Date	Status	Priority	Assigned To
Edit Cls	Call with reminder 2d prior		<input checked="" type="checkbox"/>	8/16/2011	Not Started	High	Jennifer Darrouzet
Edit Cls	Call to conduct post-event interview		<input checked="" type="checkbox"/>	8/22/2011	Not Started	High	Jennifer Darrouzet

Activity History

Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Board member to invite Darren Demar to Stomp Out Obesity Event	Stomp Out Obesity Workshop: 08/19/2011, 13:00 - 16:00	<input checked="" type="checkbox"/>	6/30/2011	Victoria Walton	6/17/2011 12:52 PM
Edit Del	Log official response	Stomp Out Obesity Workshop: 08/19/2011, 13:00 - 16:00	<input checked="" type="checkbox"/>	6/20/2011	Jennifer Darrouzet	6/17/2011 12:55 PM
Edit Del	Confirm via email with map & parking pass	Stomp Out Obesity Workshop: 08/19/2011, 13:00 - 16:00	<input checked="" type="checkbox"/>	6/18/2011	Jennifer Darrouzet	6/17/2011 12:56 PM
Edit Del	Provide letter, script & URL	Stomp Out Obesity Workshop: 08/19/2011, 13:00 - 16:00	<input checked="" type="checkbox"/>	6/18/2011	Jennifer Darrouzet	6/17/2011 12:53 PM
Edit Del	Assign best person to extend invitation	Stomp Out Obesity Workshop: 08/19/2011, 13:00 - 16:00	<input checked="" type="checkbox"/>	6/17/2011	Jennifer Darrouzet	6/17/2011 12:53 PM

Shift Assignments

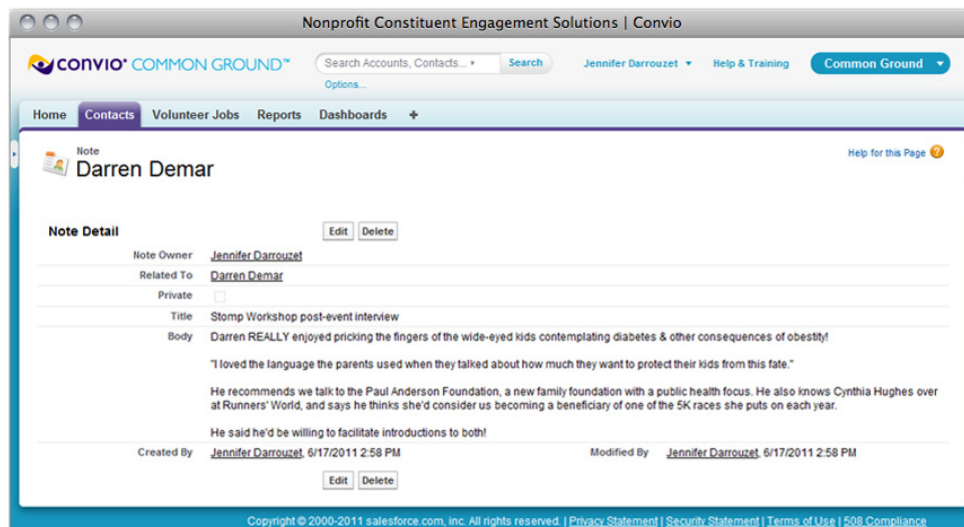
Action	Volunteer Job Shift	Attended	Shift Date	Status	Number of Volunteers	Credit Hours
Edit Del	Stomp Out Obesity Workshop: 08/19/2011, 13:00 - 16:00	<input type="checkbox"/>	8/19/2011	Signed-Up	2	3.00

Here, staff have created a special cultivation plan for those invited to participate in a high-value volunteering event related to the prevention of obesity. Note that the invitation activities have been logged, and all that's left to do for this contact is the reminder immediately prior to the event, and the follow-up call, to hear about his experience participating in the program.

You cannot call the event complete until you've completed individual debriefs with all attendees. Ask them:

- How did the event go the other day? What did you like the most? How could it be improved?
- How/would you describe [the activity] to your family or friends?
- Were there any ideas you took away from [the activity], that you'd recommend we act on?
- Who else do you know who might be interested in coming to an event like this?
- Who do you know who might help us deliver on our mission, or develop funds that can help us deliver on our mission, more effectively and efficiently?

Thank them again for serving their community, and express the hope they will remain involved (perhaps recommending they save the date for a fall or winter event). And be sure to document the feedback they've given in your donor management system!



After the event, development staff are prompted to follow-up with each attendee, where they log priceless feedback & advice from this high-value volunteer.

Remember that the benefits of events like this may not show up in an immediate uptick in gifts this week, or even next month. But you've put a face on your mission and injected unforgettable personal memories of impact—right into the brains of your community's movers and shakers. These volunteering experiences deliver significant goodwill among current donors (who feel all-the-more certain they were savvy to support your previously) AND among likely prospects, who've now given you personal feedback about how helping you makes them feel, and how they can help you in the future. You are well on your way to increasing your fund development this year.



Get to know Convio Common Ground a little better by visiting our video library or attending a product tour: <http://www.convio.com/takealook>
Or contact us at **888-528-9501** or info@convio.com.

ABOUT CONVIO

Convio is the leading provider of on-demand constituent relationship management (CRM) software and services that give nonprofit organizations a better way to inspire and mobilize people to support their organization. Convio Online Marketing, the company's online marketing suite, offers integrated software for fundraising, advocacy, events, email marketing and web content management, and its Convio Common Ground™ CRM system helps organizations efficiently track and manage all interactions with supporters. All Convio products are delivered through the Software-as-a-Service (SaaS) model and are backed by a portfolio of best-in-class consulting and support services and a network of partners who provide value added services and applications focused on the unique needs of nonprofit organizations. For more information, please visit www.convio.com.

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