Cultivate, cultivate, cultivate. Those three words were drummed into my head as a fundraiser and event planner, first for Boston’s WGBH Public Broadcasting and later at Audubon North Carolina.

By “cultivate” I mean create a personal connection with your donors that will enhance the likelihood of a long-term relationship leading to increased giving. Special events provide a good opportunity to make a personal connection with your donors. They give you the chance to educate your donors about your organization while also allowing you to learn more about them and what makes them give. In combination with your newsletters, annual report, cultivation and solicitation letters, and e-mails, events are a key component of a long-term cultivation strategy.

Germaine Frechette, Assistant Director of Special Events for WGBH Public Broadcasting, says, “The primary goal of a cultivation strategy is to maximize lifetime value of donors by building relationships and increasing revenue through moving members up the giving ladder.

It’s always less expensive to keep supporters who have already made the first step to connect with your organization than it is to go out and find new ones. Events are great tools for cultivation.”

The basic guidelines are the same for planning and organizing any nonprofit event, large or small. Follow these eleven steps to create a memorable donor cultivation event.

**STEP 1: IDENTIFY THE DONORS YOU WOULD LIKE TO CULTIVATE**

Who are the donors or prospective donors you would like to cultivate with an invitation to your event? The choices are many: general membership or mid-level donors, new donors or long-time donors, major donors or the general public, or current low-level donors who are potential major donors.

One way to decide is to think about the need you are trying to address with this event. Leah Ferguson, who runs Chrysalis Consulting with partner Kate Pett, advises nonprofit clients to look at the bigger picture when planning an event. “Most often organizations will cite ‘raising awareness about our cause’ as the desired outcome of an event. Then we have them work backwards from that. If you want to raise awareness about people living with HIV/AIDS, how is a golf tournament going to get you there? And when you’re talking about raising awareness, what you are also talking about is cultivating donors. People give when they feel moved to give. An event can move people, but you have to set yourself up for that kind of success.”

Consider, too, what position your organization is in: Are you a young, mostly grant-funded organization that would like to begin or expand a membership program? Then perhaps you’ll want to invite the general public (and any current members) to an open house during which you educate the attendees about what you do and how they can become involved.

Are you an organization with a solid membership base but no consistent mid-level or major donor support? Then consider a series of more intimate events to help you get to know your members better and let them get to know you. Frechette says, “Use the ‘show me that you know me’ philosophy — meaning, don’t sell me jazz if I like classical music!”

Are you seeking corporate support? Don Harris, Director of Development at MANNA FoodBank in Asheville, North Carolina, cultivates corporate support...
with an annual Blue Jean Ball managed by Volunteer and Special Events Coordinator Karen Etheridge. “I’m not a big fan of special events as fundraisers because it’s not an effective use of an organization’s time and money,” says Harris. “But as a friendraiser it’s a whole different ball game. We use the Blue Jean Ball to encourage the involvement of corporate sponsors. They use the event as a perk for their employees as well as for increased visibility in the community, which works out well for both of us. We have also had an acknowledgment event following the Blue Jean Ball just for the corporate sponsors where we present the Full Plate Awards. We invite the media so that the corporations get recognized publicly and get more exposure. The more exposure they have and the more connected they feel, the longer they stay connected.”

Would you like to expand your major donor base? Then consider asking a board member (or current major donor who is close to the organization) to host an event in their home for friends and acquaintances who they know have the ability to give at the major donor level. Harris describes MANNA’s concentrated major gift effort: “We’ll have small gatherings in the homes of board members and key volunteers, not necessarily as an ask, but just to get to know us. It’s a small event for four or five couples, mostly friends or acquaintances of the hosts. We’re treating our major gift effort much as you would a capital campaign, with donor rating sessions and prospect identification efforts.”

Frechette of WGBH says that it’s important to remember the social factor: “Maybe there is a peer or someone who is already related to the institution who can bring the prospective donor in. The peer is important because there is a definite social element to philanthropy.”

**STEP 2: DETERMINE THE BEST WAY TO CULTIVATE THESE PARTICULAR DONORS**

Ferguson of Chrysalis Consulting suggests that nonprofit organizations think outside the box when it comes to events. She gives the example of a hunger-relief organization that held a high-profile art auction every year that had begun to lose its luster and its income. She says, “I suggested that they have a symbolic art auction: get the children they serve to draw pictures and make paintings, and with each piece write an ‘artist’s profile’ that shares some information about the artist (keeping the child’s name and identifying information confidential) and how the organization is serving them. People would bid on each piece and the ‘bid winner’ would get their name on a plaque below the picture that could hang in the facility. During the event, board members would act as docents and take donors around, sharing information with them about the organization and its unique role in the community. Each donor would leave with a card-sized version of the painting they bid on with more information about the organization and how to give. This is how to expand your notion of an event. It doesn’t have to be entertaining, but it does have to be meaningful.”

Thinking through exactly why you’re having the event and how best to get your message across and cultivate your donors will help determine whether your event is a success or a failure.

An event is only an effective cultivation tool if your donors attend. Give them a compelling reason to come. Here are some ideas that might draw them in: the chance to talk one-on-one with the executive director or a local celebrity; getting the inside scoop on the latest information in your field; an invitation to a garden party at a board member’s house; being the first to hike a newly created trail; getting a tour of your organization’s facilities or a private screening and discussion of a relevant documentary.

Other event attractions are the chance to help celebrate a milestone that your organization has reached or an opportunity to mingle with like-minded folks while munching on hors d’oeuvres and drinking wine.

At WGBH we held a series of events for Leadership Circle members that varied with their level of giving: we invited donors at the director level (who gave between $500 and $749) for an afternoon in “The Victory Garden” to meet the director and new host of a popular show; we invited producer-level members ($750–$999) for “Outside the Box” in-depth, roundtable conversations with station managers and decision makers. For $100+ donors who had a strong interest in our radio programming, we invited them into the studios for simple FM Live events, during which they formed an intimate audience for a live on-air performance.

At Audubon we focused on increasing membership in the Pearson Society (donors who gave $1,000 and up). For one event, the board chair hosted a catered dinner in his home to which we invited potential major donors and friends of the chair with an interest in Audubon. Although attendees knew they would be invited to join the Pearson Society at the event, we had a full house because the director was giving an update on Audubon’s opposition to a Navy proposal that would affect a National Wildlife Refuge and Important Bird Area, an issue that was in the news a lot at the time.

**STEP 3: DETERMINE YOUR EVENT BUDGET**

Take a look at what you can spend on events this fiscal year and how much of that you want to spend on any
particular event. If you have a small event budget, it may be better to spread expenses out over the year with several smaller events rather than one lavish fête.

Depending on your event, you may need to allocate money for any of the following items:

- **Food and drink** *(Whether it is catered or you buy the wine and a cheese platter at the local grocery store)*
- **Venue** *(Will you need to rent a space, or will you hold the event in your office’s conference room or at a board member’s house?)*
- **Flowers** *(Whether you hire a florist to deliver centerpieces or pick up a bouquet at the grocery store)*
- **Equipment rental** *(Extra chairs, tables, easels, or audio-visual equipment)*
- **Entertainment** *(Will the director be speaking, or will you invite a special guest whom you may need to pay or provide travel expenses for?)*
- **Graphic design** *(Will your invitation and other event materials be created by a graphic designer or will they be designed on your office computer?)*
- **Printing/materials** *(Will your invitation and other correspondence be e-mailed? If not, will you print it on your own printer, at a copy shop, or through a professional printer? Will you need to create any signs, banners, or posters?)*

If your budget is limited, think about where you need to spend money and where you can go cheap or get in-kind donations. For example, for MANNA FoodBank’s annual Empty Bowls Event, a national event started by a local potter, everything is donated except the invitation. MANNA’s Harris says, “We have local potters make handmade bowls and then invite members of the community to come for a simple soup and bread meal. They pay $20 to attend, they eat out of the handmade bowls, and then they get to keep them. A lot of people in the community who are not our regular donors come back every year. Restaurants donate the food and the Doubletree Hotel donates the space and staff help. We have musical entertainment that is donated. We also have an underwriting sponsor who pays for the other event costs, so the money raised goes directly to support MANNA.”

**STEP 4: GET SPECIFIC**

Nail down the date, time, and location. Book any special guests and venues as far in advance as possible. Create a general timeline for when everything should be done and start a list of all the steps that need to happen between now and the event. Decide on what roles staff, volunteers, and board members will play and what vendors you will need to hire (caterers, graphic designers, rental equipment, florist, etc.). Think about how many people you ideally want to be cultivating at the event and choose a space that is appropriate for that number.

**STEP 5: CREATE THE INVITATION**

Whether the invitation will be an e-mail, a flyer, or a four-color, design-house card, you’ll need to write and design your invitation, including all the pertinent information (date, time, location, organization, speakers or special guests, activities, food and drink, reason for event, and an RSVP date). Include your contact information (e-mail and phone number) for questions and RSVPs. Sell your donors on the event with engaging copy and design and a compelling reason to come. The invitation sets the tone for the event and for all the other materials you will create around it, including signs, posters, follow-up letters, and “take-aways.” If the event is far in the future, you may want to send save-the-date postcards first.

**STEP 6: INVITE THE GUESTS AND KEEP TRACK OF RSVPs**

Once you send out the invitation, you will need to keep track of who is coming to the event and who their guests are. You can use a spreadsheet or database that can also generate mail merges for the invitations and all follow-up communication, event attendee lists, and name tags.

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### Nine Ways to Increase Your RSVP and Attendance Rate

1. Make the event and invitation interesting; have a compelling reason for donors to come.
2. Tailor the event to the donor group.
3. Choose an event date that doesn’t conflict with major holidays, school vacations, competing events, or a time when your major donors have gone south for the winter (or north for the summer).
4. If inviting a small group of people, hand-address the envelopes. If inviting a large group, print the addresses on your own printer, at a copy shop, or through a professional printer. Will you need to create any signs, banners, or posters? The invitation’s not effective if they don’t open the envelope.
5. Use real stamps if the mailing is small. Choose interesting stamps related to your organization if possible.
6. Tell donors that space is limited and urge them to reply soon.
7. Confirm all RSVPs promptly.
8. If you are not getting the response you had hoped for, send reminders to the donors you invited, or invite another group.
9. If the numbers allow, call or send reminder notes to the people on the RSVP list shortly before the event.
especially for the Blue Jean Ball. First off, if they are in a
decision making position in their own business, then we’ll
ask them to get their business to support us. Then, as in
any fundraising campaign, we’ll ask them to review the list
of prospects. We’ll ask, ‘Who do you know and
who do you feel comfortable soliciting?’ We’re tak-
ing advantage of our board members’ relationships
in the community.”

Make any necessary parking arrangements.
Put up signs outside the event and have a staff member or
volunteer direct traffic and help with parking. If your
parking area isn’t sufficient, can your donors park on the
street or can you arrange to use a local church or business
parking lot?

Have a staff meeting to go over event timing and
details. Make sure the right people have a timeline of the
event so they know when to go up to the podium and
address the crowd, or to dim the lights and start the film
rolling, or whatever. Make sure the executive director,
development director, and/or board chair also have a list
of who is attending and possibly their donation level and

Confirm all attendees as they RSVP. If you speak with
them on the phone, confirm the spelling of their names
and those of their guests. If they leave a message or send
an e-mail, call or e-mail back to confirm all the details so
that they know you received their RSVP and that they are
on your list for the event. Tell them that you are looking
forward to seeing or meeting them at the event.

Because response rates for events can be low, invite a
lot more people than you expect will attend. Response
rates vary from organization to organization as well as
from event to event. In general, an average response rate is
between 10 and 30 percent of those invited; a really good
response rate (more likely the more familiar and interac-
tive you are with the group invited) is 50 percent. Figure on
actual attendance being about 20 percent lower than your
RSVP list. If the response rate to your initial invitation is
lower than you’d like, consider extending the RSVP date,
sending a reminder invitation to donors, and/or extending
the invitation to a new and wider list of your donors.

**STEP 7: COUNTDOWN**

The better everything is planned and organized, the
more successful your event will be and the better you will
be able to deal with last-minute changes or troubleshoot-
ing that needs to be done.

Line up all the vendors you need. You may need to call
around to get the best quote for your event. Arrange deliv-
ery times with your vendors and make a note of the
details on your event timeline and to-do list.

Create a detailed timeline for the event day. Include
vendor deliveries, set-up details and times, volunteer tasks
and arrival times, and all the other details of the event.

Create all the materials you will need for the event,
including event signs, parking and bathroom signs, and
any handouts and “take-aways.” The “take-away” can be
as simple as an information sheet about your organization,
or it can be a pin, a magazine that includes an article about
your organization, a book, or something relevant to the
theme of the event. Ferguson of Chrysalis Consulting
says, “You want people to walk away with something. The
Empty Bowls project is a great example of this. You leave
with an empty bowl as a reminder of how many people go
hungry and with a brochure detailing how you can help by
supporting hunger relief efforts.”

Assign staff, board, and volunteer roles. Harris of
MANNA FoodBank sees special events as a way to get
board members on the fundraising team. “We ask our
board members to help us solicit our corporate sponsors,
especially for the Blue Jean Ball. First off, if they are in a
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**Sample Timeline of the Event Day**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>9:00 AM</td>
<td>Party Rentals drops off chairs, tables, and tablecloths</td>
</tr>
<tr>
<td>10:00 AM</td>
<td>Staff set up tables and chairs</td>
</tr>
<tr>
<td>4:00 PM</td>
<td>Flower Creations drops off flower arrangements</td>
</tr>
<tr>
<td>4:30 PM</td>
<td>Yummy Catering drops off cheese, crackers, and fruit platters</td>
</tr>
<tr>
<td>5:00 PM</td>
<td>Volunteers arrive and review roles with staff member</td>
</tr>
<tr>
<td>5:15 PM</td>
<td>Volunteers set out nametags and get ready to welcome guests</td>
</tr>
<tr>
<td>5:45 PM</td>
<td>Open doors, welcome first guests</td>
</tr>
<tr>
<td>6:00 PM</td>
<td>Event start time</td>
</tr>
<tr>
<td>6:00–6:45 PM</td>
<td>Donors mingle and eat</td>
</tr>
<tr>
<td>6:45–6:55 PM</td>
<td>Executive Director, staff member, or board member takes podium, welcomes guests, and introduces special speaker</td>
</tr>
<tr>
<td>6:55–7:15 PM</td>
<td>Special speaker takes podium and gives presentation</td>
</tr>
<tr>
<td>7:15–7:30 PM</td>
<td>Mingle</td>
</tr>
<tr>
<td>7:30–7:45 PM</td>
<td>As guests depart, volunteers and staff thank them for coming, collect nametags, and hand out the “take-aways”</td>
</tr>
<tr>
<td>7:45–8:15 PM</td>
<td>Staff and volunteers clean up</td>
</tr>
</tbody>
</table>
any other pertinent information, such as the donor’s particular interest in your work, so they can do their schmoozing job properly.

**The job of key staff members and board members is to mingle and schmooze with the donors.**

Review the guest list and make sure all the guests are confirmed. If you like, you can call or send a note reminding them about the event and giving driving or parking directions, if necessary. Make nametags and a list of all the donors who will be attending.

**STEP 8: SHOWTIME!**

It’s the day of the event. Everyone is in their place. Volunteers and staff are at the front table with an attendee list and the nametags spread out in alphabetical order. If possible, plan to open the doors 15 minutes early. Welcome each donor as they collect their nametag and check their name off on the attendee list. You will want an accurate record at the end of the event of who came and who didn’t, both so you can follow up and so you can enter the information into your database.

The job of key staff members and board members is to mingle and schmooze with the donors. Remember why you’re holding this event: develop the relationships that you put the event together to cultivate.

Assign a staff member or volunteer to take photos during the event. These are great for newsletters, for donor cultivation purposes, and for the office bulletin board.

**STEP 9: FOLLOW UP WITH YOUR DONORS!**

Send a prompt follow-up letter thanking each donor for coming to the event. Take the opportunity to tell them more about your organization and goals in the letter.

Frechette of WGBH says, “Most people don’t expect event follow up, so you have an opportunity to stand out among other organizations. Perhaps you have an attractive photo of the donor at the event — this is always a great reason to write and say, ‘Thanks for attending, great to meet you and here’s a nice memory.’ Or there’s an article in the paper that is pertinent to the event subject and can be mailed to all those who attend with a meaningful cover letter restating the value of their support. Or you have a list of additional event offerings that may be of interest.”

Following up after the event is one of the most important steps of the entire process. Take every opportunity to communicate and connect with your donors and prospective donors. Special events cost more money than most other cultivation efforts and are the least likely to show immediate results. One of the keys to ensuring that the money was well spent is to follow up with your donors after each event.

Even no-shows should be seen as an opportunity for sending follow-up letters. Tell them you’re sorry they weren’t able to make it, give them a quick event recap, include the materials you handed out, and say that you hope they can make it to the next event.

**STEP 10: FOLLOW UP INTERNALLY**

Send thank you notes to your volunteers, board members, and special guests — anyone who helped make the event successful. Show appreciation and they will want to help you again with your next event.

Enter event attendance in your donor cultivation database to track the effectiveness of your events as part of your overall cultivation strategy and also to help track donor interests (did they come to the policy event but not the garden party?).

**STEP 11: REVIEW THE EVENT**

Have a staff meeting to discuss the event while it’s still fresh in everyone’s mind. Talk about what worked and what didn’t. Write down event successes or failures immediately for future reference. Solicit feedback from your volunteers and other people involved with the event as well — they are likely to have different viewpoints.

Thank everyone for their hard work and give yourselves a pat on the back for a successful event! And remember that, like anything else, the more you do differently next time? Write down event successes or failures immediately for future reference. Solicit feedback from your volunteers.

Following up after the event is one of the most important steps of the entire process.

Jean Van’t Hul is a freelance writer based in Asheville, North Carolina. As a development professional, she has planned many special events for all donor levels.