

Missionizing Your Special Fundraising Events

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Terry Axelrod recently joined us for a webinar in which she showed how to assess your current special fundraising events and strategically infuse them with your mission.

Full Transcript:

Steven: All right, Terry, my watch just struck 3:00 Eastern. Is it okay if I go ahead and kick us off officially?

Terry: Yes, it is.

Steven: All right. Cool. Well, good afternoon everyone if you're on the East Coast and I guess good afternoon also if you're on the West Coast because it's noon there. Thanks for being here for today's Bloomerang webinar, "Missionizing Your Special Events." And my name is Steven Shattuck and I am the Chief Engagement Officer over here at Bloomerang and I'll be moderating today's discussion as always.

And just a couple of housekeeping items before we get started, just want to let you know that we are recording this presentation and we'll get that recording in your hands later today. So, if you have to leave early or perhaps you want to review the content later on, have no fear. Just look for an email from me later on this afternoon.

Most importantly, please use the chat box today as you're listening in. We're going to save some time for Q&A at the end of the presentation. So, do not be shy at all about sending in your questions and comments. We'll see those throughout the broadcast and we'll try to answer just as many as we can before 4:00 Eastern. You can also follow along on Twitter. You can send your comments and questions there as well, just use the hashtag #bloomerang or send us a message directly @bloomerangtech.

And if you have any trouble with the audio or video today, usually these webinars are only as good as your own Internet connection, unfortunately. If you have any trouble with the audio, specifically if you're listening through your computer, I recommend you try dialing in by phone if you have any problems. Usually the audio quality by phone is a little bit better. So, if you can do that and don't mind doing that, just check that email from ReadyTalk that went out about an hour ago and there's a special phone number in there just for you.

And if this is your first webinar with us, I just want to say a special welcome to you. We do these webinars just about every Thursday. We only miss a few weeks out of the year. But in addition to that, Bloomerang offers donor management software. So, if you are in the market for that or perhaps just want to learn more about Bloomerang, check out our website. You can even download a quick video demo and see the software in action.

But for now, I am super excited to introduce Terry Axelrod coming back to our webinar program. She's a good friend of Bloomerang. I really excited to have her back and share all of her knowledge with us. How's it going, Terry?

Terry: Just great, Steven. I'm super happy to be back. Thanks for having me.

Steven: Terry, I want to brag on you really quickly. If you guys don't know Terry, she is the CEO and founder over at Benevon. She's got over 30 years of experience in the nonprofit field. She has helped raise a ton of money. She has created the Benevon model. But before doing that, she served as a development director at a private inner city school where she raised \$7 million in two years through all the kinds of things that she's going to talk about today.

Over the past 20 years through her work at Benevon she has worked with over 5,000 nonprofits to help them raise money. I think she's over the \$1 billion mark, if I remember what you said last time you were on our webinar, Terry.

Terry: You got it. That's right. Yeah.

Steven: That's crazy. That's ridiculous. That's \$1 billion with a B. You're going to understand why as you're listening to this presentation why she's been able to raise all that money. So, I'm going to pipe down and let Terry take it away. Go for it, my friend.

Terry: Wonderful. Thank you, Steven, and hi, everyone. Thanks all of you for being here. I'm going to forward the slide here and kind of dive right in.

So, as Steven said, today's agenda is "Missionizing Your Special Events." Pretty much every nonprofit does some kinds of special events. So, we're going to be looking at how to insert the mission and use that event as a way to forward your process for more deeply engaging individual donors. We find great development folks get burned out on event after event after event. Donors get burned out on it, but nobody really has a plan, a strategic plan for how to insert the mission and forward what you're really up to, which is building that pipeline for major gifts.

So, in today's webinar, I'm going to be showing you both the Benevon model and the events that we have built into our model, but also the four basic types of nonprofit events. We have our whole nomenclature for events, 17 soul searching questions that you can ask to analyze each event, whether or not it's worth keeping or not, strategies for infusing your organization's mission into the event if you're going to keep it and then how to design a year-round system of events that will build lifelong donors for your organization and really decrease development staff burnout.

I'm going to be working through a few of the chapters in the book that I wrote called "Missionizing Your Special Events: How to Build a System of Events that Engages Donors Who Will Stay with You for Life." I love this book because it really has examples in here from groups that we've worked with that said, "It's kind of complicated. We have a volunteer who really loves that particular event. The board chair is getting tired of it and the CEO, it's his one time to get out in public during the year. Yet, it doesn't really net us very much and our staff are burning out on it and they can be spending their time doing other things."

There are very specific examples in the book. I'm not going to go through all of them. But I am going to focus on a few parts of it and at the end we're going to offer a discount on this book. I'll tell you about that at the very end if you'd like, but I will be referring to certain pages in it and you'll be able to see those as we go along here.

So, starting with the Benevon model, let's just talk about the four types of events we're going to cover today. This is from page 21 in that book. The classic point of entry and its three derivative events—and this will make sense to you when we're finished—number two, the one-hour ask event, number three, the free feel good cultivation event and number four, the point of entry conversion event.

Those are a bunch of words that probably make no sense and my job in the next few minutes here is to bring some sense to that and have you see how these terms could apply to what you're already doing and help you more effectively missionize your events.

So, let's get started. First one, first event, that number one up there, the classic point of entry event—so, let's look at that first. This is in the Benevon model, how people find out about your organization. We call it a tour of your mission. So, it's not a tour—it's a tour that you would be offering twice a month minimum and it's got to include facts about your organization, emotion and a way to capture people's names with their permission. We don't ask anyone for money there. This is an event. It's an event you'll be doing twice a month minimum.

Let's kind of walk through quickly the agenda for that event. It starts off with a greeting. Usually at the school where I started the model in Seattle, we had a child greeting people right as they came in the front door and then there was a little sign in table. Everyone is invited to the point of entry event by someone we generically refer to as an ambassador.

That's a person who has invited personally by a private invitation—this is a private event—they've invited personally their book club, their yoga group, their sports group, the particular group of friends of theirs and in inviting them, they've told them, "You're going to be asked to fill out a little card. They are going to call you one time afterwards to get your feedback but you will not be asked for any money there."

So, people are very willing to sign in. They know what's happening. There's a little individual card they each fill out. There's a time for them if they get there early to look around, see some posters on the walls, perhaps observe in our case some of the kids getting dropped off at school and getting their hot breakfast and such.

Then the program starts right on time. We did ours at 8:00 a.m. with everyone seated and the welcome is done by the person we call the ambassador. So, if you all are in my book club, I'm the ambassador and I welcome you and I say, "You've all heard me talk about this place so much at book club and I'm really grateful that you would come out today. I know a lot of you don't even know about this. It may not be your most special hot button nonprofit kind of work, but you came because I invited you and I appreciate that."

"My greatest hope today is as you walk through and learn about what we do here, you'll be thinking about other people in your life that might be interested in knowing more about this so that when you get a call from Susan in a couple days to follow up and get your feedback on today's point of entry, today's tour." You don't call it a point of entry. You'd give it a warmer sounding name. You'll be thinking about other people and you might even offer to

be an ambassador like I am and invite your group or host one of these at your own office or your location in a box, we call it.

Then comes the visionary leader. That's the CEO or executive director, a five-minute talk going deep into their personal connection to the organization, results related to the three what we call bucket areas, three primary areas of impact that you have and then their vision for the future.

And then people get up, walk around, take a tour, three stops. Each stop focuses on one of those three bucket areas where we tell a myth-buster fact, a story and a need. This is very tightly crafted. It's described in quite a bit of detail in the book. But the point is people are moved to tears. People are changed out of just coming to this. You don't use any video. You may use audio tape. Often stories are told through letters and the live testimonial, which is the last element. Someone talks about how your organization really changed their life.

This point of entry event, if you take nothing else away from today, there are elements in this event that are essentially to missionizing any event you will be doing. I'll point some of these out as we go along.

We end with a thank you from the ambassador, who again says, "When Susan calls you in a couple of days, I hope you've been thinking about other people and perhaps some of you would agree to be an ambassador and help us spread the word, because the very best way you can help us is to spread the word about what we're doing by sharing this with your colleagues and friends." So, that's a point of entry.

Step two in the model, we do a one on one follow-up call with very specific criteria for the purpose of determining is this person really interested in what we're doing or should they be what we refer to as blessed and released. Not everybody is going to be interested. You see that fifth question there. Is there anyone else you can think of that we ought to invite to a similar point of entry? That's where you're going to be hearing people say, "I've been thinking about it."

We have groups that if they have 10 or 15 people at their point of entry, because that's what we ask an ambassador to do. We ask an ambassador to host and fill a tour with at least ten people. We have groups that in this follow-up call, all 10 of the guests will say, "Yes, I want to be an ambassador," right away.

At a minimum, our metric is that 1 out of every 10 guests will say yes, that they would like to do that. We don't ask anyone for money here and our bless and release rate is about 50%. So, we allow that about 50% of the people will say they're not interested at all, not just in not being an ambassador, but not interested in being involved at all, which is absolutely fine.

The third step in the model is where we ask for money. I'm going to be talking a little bit about the ask event here. First I want to point out that we don't ask for any money at step one or step two. We wait until the fruit is ripened, as we kind of crassly say. The way that happens is by step two there, you can see the cultivation super highway. Cultivation super high way is where we hasten the ripening of the fruit by having more contacts.

You see, I kind of think of the point of entry like a first date where you don't tell everything. In the follow-up call, you kind of find out which is their hot button, which aspect of the work we do, which bucket area really moves people. So, based on that, you invite them back for subsequent contacts on more dates that focus in particularly

right in on the area of their greatest interest. So, you've got to really know what that is and listen very closely during the follow-up call to invite them back.

For example, we have a group that's working to cure a disease that has seven strains to it. They will call people after their point of entry and sometimes people will say, "I'm really glad you're working to cure the whole disease, but I'm more interested in that third strain of the disease because that's the one my mother has." So, that's a big hot button. When they call them back, they're going to focus in on inviting them perhaps back to meet with a scientist or researcher or some kind of a program related to the disease they're most interested. You've got to really be listening closely to that.

After people have had a couple of dates, after they've come to the point of entry, they've had a couple more contacts, then we say that it's time you can ask them for more money if they haven't been blessed and released. The bless and release people we don't do any subsequent contact with.

So, the asking happens in our model in two ways, either one on one or at this free one-hour ask event. Now, the Benevon model is all about pipeline for major gifts. So, we're not really about events at all, but we start off the first year with this free one-hour ask event, which is the way to get people to join a multiple-year giving society so that we then know that they're the people that we want to cultivate further for one on one larger gifts.

So, this free one-hour ask event, who's going to be there? Let's look at who would be the table captains. The table captains in our model are only people who have been ambassadors in the prior 12 months, not 5 years ago, not board members that just at the last minute we wrangle into filling a table. No, there's no fill a table mentality at all. We look at the people who have demonstrated that they are good ambassadors. They've already invited a bunch of people to the points of entry and that's who they invite to sit at their table at the ask event.

So, using a database—I'll just say at Benevon, we are very proud of our new relationship with Bloomerang and we've developed a private label version called Bloomerang for Benevon. So, if you were to use that, it would be very clear because it tracks who your ambassadors are, it tracks who your point of entry guests are. You'd go back and it even tracks the conversation that they've had, the answers to those questions and the follow up.

And you would go back and identify who are the people that should be the table captains. You ask each one of them if they would be willing now to host a table at this free one-hour breakfast or lunch that you'll be putting on in a few months and you remind them that the people you want to invite to sit at their table are the same people that came to their point of entry they hosted, except for the ones that were blessed and released.

So, let's walk through the typical program. We start with before the clock starts. So ours, at the school where I did this, we did at 7:30 in the morning on a dark, rainy November Thursday. Before people even got into the room, they were greeted at the street under the overhang in the outdoor drive through area at the hotel, it was a lovely hotel, by two of our little girl students in their plaid uniforms and hair braided. They were escorted to the escalator where they were met by two older boys who shook their hands and looked right in their eyes and said, "Thanks for coming, go right this way up the escalator."

And then as you're going up the escalator, you cannot see the children standing on the risers in the empty ballroom belting out their favorite school songs to amplified organ music, but you can hear their voices

resonating down through the escalator as you're going up. You're kind of getting in the mood. You pick up your nametag out in the big lobby area, walk in and find your table and who's there but your friend, the table captain, ready to greet you with a hug or handshake.

The program starts right on time, never late, with a welcome from a board member followed by what we call the short emotional hook. Now, at our school, we had our pastor do an invocation. But we will often have a poem or song. If it's a domestic violence organization, sometimes they'll play a tape of someone calling in to 911 for help. It's very short but it definitely makes the point that we're not just here for breakfast or lunch. We have a specific agenda in mind. It's mission-related, that short emotional hook element.

Then the board member comes back up and says, "Enjoy your breakfast." While you're eating look at the little fold over table tents we have in front of each person with a photograph of a child, for example, at our school and their story written out next to it. As you're eating, you feel a tap on your shoulder. It's a little child with a basket of apples looking you right in the eye and saying, "Thank you for coming. Thank you for coming."

It's impressive. You're kind of getting the point that it's not about the apple. It's about that this is the child that goes to the school. These are people right in my community who would benefit. For example, another example would be when we work with a nursing home, they might pass out holiday greeting cards with a pen and ask people to write a message thanking someone, wishing them a happy holiday.

When we worked with the American Lung Association, they passed out those little cellophane tiny bags and inside each one was a little miniature drinking straw. They said, "Just hang on to this for later. Later on in the program to demonstrate what it feels like when they have an asthma attack. They asked everyone to open the bag, take out the straw, put the straw in their mouth and pinch it halfway closed and then try breathing to try to get an experience of what it feels like when you're having an asthma attack.

So, there are all kinds of things you can do. It's definitely not about the gift. It's about the impact of it when you explain it to people. Okay. Visionary leader talks—so, breakfast is over or lunch. Up comes the visionary leader and that is the CEO or executive director who does about a five-minute very powerful talk about their vision for the organization.

Then a seven-minute video that moves people to tears, not necessarily tears of pity and sadness, but joy and inspiration as they watch three vignettes, one about each of your three bucket areas. For example, it might be supporting individuals, strengthening families, building community and you would have a story, a vignette, a video of a family in each one of those, making the point about how we support families or strengthen individuals like that.

Then there's a live testimonial at the very end. Now at our school we didn't do a live testimonial. We had a bunch of little kids and had them interviewed by a lady who asked them three questions about what they loved about going to the school and their favorite subject and what did they want to be when they grew up. Each time, these little children resonated with—they had the answers and they were adorable but really powerful, especially when she said, "What do you want to be when you grow up?"

Because after you'd heard these kind of sad stories about the tough lives that they'd had so far, you suddenly were hearing a huge vision come from each child and you realized the school had inspired them with that vision. So, now you're sitting there thinking to yourself, "Wow, this is pretty impressive. I didn't know this school even existed when I came here or if I knew, I didn't know all of this."

So, you're now ready for the last element in the program, what we call the pitch. So, this is where you're asked to join a multiple-year giving society, making a pledge in those top three boxes of at least \$1,000 a year for each of the next five years. So, this is the actual pledge card. This is sort of a version of it that we used at the school.

You can see at the top, we ended up having 850 people, of which 80% of them had been to the points of entry in the prior 12 months. So, you must have at least 50% of your guests have to have been to the point of entry. Don't even bother having an ask event if you're going to bring in a bunch of new people. It only will work if you're actually cultivated them with a dating process leading up to this.

So, of our 850 people, you can see in those blue boxes there 115 people, the top box there gave \$1,000 a year for five years, 8 people did \$10,000 a year for five years and 4 people did \$25,000 a year for five years, which just that alone equaled nearly \$1.5 million when you include all the pledges. That came from fewer than 15% of the people who were in attendance.

Now, notice that we had another box on the pledge card, box number four, and that was for people who could fill in the blank. How much did they want to give and for how many years? Some people may say \$100 once or \$50 three times, whatever they wanted to give was absolutely fine. Then that last box, even if they had checked a box above or hadn't, they could say, "Contact me, I have other thoughts to share," and a lot of people said, "I've got real estate to transfer, a stock. I'm a board. I want you to come talk to me or I just have some advice for you."

Whatever it was, we were very happy to have people—we're very happy to call everybody who said that. We were totally shocked at the results of this first ask event. So, the next day, I got on the phone and started calling people and I said, "Thank you so much for coming yesterday to this ask event. What did you think of it?"

I was quiet and listened and I heard the same thing over and over again from people. They said, "If I had known how great that event was going to be yesterday, how terrific your school was or that I was going to give you all that money, I would have invited other people." This seems to be the natural human response when people feel they've made a true contribution from their abundance as opposed to a one-time donation from scarcity. They started telling me the names and next door neighbor, buddy from the health club.

Before I knew it, I was writing down the names of all these people and I caught myself. I said, "Here it is the day after this event where you just gave so generously. We're thinking we ought to have this event again next year. Would you be willing right now while you're excited about this to agree to be a table captain at next year's ask event? And you would have between now and next year at this time to do the fourth step, which is to become an ambassador and introduce those friends of yours to our school."

"How are you going to do that? By hosting them at a point of entry event. Be an ambassador. We will educate and inspire them at the point of entry. We will follow up. We will bless and release them if they're not interested or cultivate them with more dates if they are so by the time they're sitting at your table next year, they're going to

be the people ready to give or they don't need to give at all." So, by following this process over and over again, it continues to grow.

So, let me go on to tell you how we continued to cultivate. The whole point of the ask event in our model is not so you raise a lot of money. It's so that you identify who are those people who make the five-year pledges.

If you remember from the pledge card, they don't have to make a five-year pledge. They could give you \$1,000 a year one-year at a time. So, the people who are doing the five-year pledge are telling you something very specific. They're saying, "I know I don't have to make a five-year pledge. I want to." That allows you to know one of the key things in the development field as many of you know is where do I focus.

I've got so much coming at me with holiday mailings and social media and all kinds of marketing and newsletter and three events coming up, grants to write, how am I supposed to focus? Once I had those 115 new best friends, I said I know where I'm going to focus now. I've started doing it through these three feel good cultivation events, which is another type of event in our model.

So, a free feel good cultivation event, what is that? That's an event that you're already doing. It is not something like free tickets to the golf tournament. It is actually a mission-focused event. So, at our school it was the graduation. We're a school. We have to put on a graduation anyway, right? So, we invited all of those big donors in the top three boxes there and we invited them to come to an event that happened right before the graduation. Graduation was at 7:00 in the big auditorium and at 6:30 in the room next door, we had a podium setup.

We had a nice little reception for all the big donors and we had the principal come out. He talked behind the podium, bragging about the test scores and grade point average of the kids and where they were all going off to school. Then we had a grandmother and her grandson come up and talk about how the school impacted their life. Then everybody was invited to go back in the other room for the graduation into the auditorium.

You see, if you do it right, that free feel good cultivation event, like the graduation in our school example, is what we call a point of reentry. Just like a first time point of entry, a point of reentry gives people those same three things—the facts, so there was a principal with the test scores and the grade point averages, the grandmother and grandson for the emotional hook, you know that's emotional, capturing names with permission was no problem because we already had the names of everyone. We had invited them. They were our donors. We knew who they were.

So, three days after that, we called them all and thanked them again. Thanks for coming. What did you think? One by one, people said, "I had other people in mind once I was there. I had forgotten all about this other group I'm involved with." So, we are constantly deepening our relationship leading up to the next ask.

After about six months—actually within the first six months of doing the ask event at our school, which was the first fundraising we had ever done—we had just raised \$1.5 million—we found ourselves in a position of needing to do a capital campaign. We were asked to leave the building we were in. We had to find a new building. We found one, had to renovate it for \$3.2 million. Did you catch the part I said about within the first six months of the ask event?

So, the only donors we had were those ones that I just showed you on that chart. What were we going to do? We started offering little points of reentry for small batches of our major donors, if you will. Maybe we'd invite 5 or 10 of them to an evening session, where we showed them the architect's drawings of the new building, the pyramid chart with the number of gifts we needed to get to our \$3.2 million, naming opportunities like name the chapel or the gymnasium after your family, and sure enough, within six months, 18 of those same donors had just given us a total of \$3.2 million. This is one top of their annual gift.

All that other money, all that money on the pledge card that I told you earlier, that's all unrestricted operating. There's nothing in there that's restricted. This money was restricted for capital, but because these people had made those five-year pledges and we had gotten to know them, a subset of them, 18 people of the 129, I believe there were in the other chart, 127, 18 of them were willing to step up and contribute a collective \$3.2 million.

So, let's go back now to the four types of event that I set. So, I've now shown you a classic point of entry, okay? Its three derivative events, what would those be? So, the point of entry in a box is where you take those elements at the point of entry, you don't do this right off the bat, but once you've practiced it a few times in your office or your main center, you are able to extrapolate those elements using certain props and you've got all the same stories and turn that into—take it on the road and turn it into what we call a point of entry in a box.

It can be done in a board member's office. Often people will do it in the office of a sponsor or vendor, a board member. Some people do it in a home. Some people do it in a church basement. It's always hosted by someone in particular called a point of entry in a box.

Then we also have the one on one point of entry. We don't do a lot of this because it's a lot of work, but occasionally you'll have a big potential donor. Sometimes people will do it if they've got a foundation who wants to come out. You've now got a great way to tell your story with this one-hour point of entry. Then the pre-point of entry, I heisted to even put this on here, but it's in the book, so I left it in, which is I don't even consider that a point of entry, but an example of a pre-point of entry would be something like a rotary meeting or a community meeting where you're invited to go out and speak.

A lot of people think, "We're already doing points of entry. We're already invited all the time. We do many of these a month, this kind of speaker circuit where we get 10 to 20 minutes to tell our story." That is not a point of entry, but I put it here just to mark the place for it because for example, if you are invited to do one of those events, let me tell you some tricks for how to convert those events into a pre-point of entry.

So, let's just say for example you have someone on your board who's in the Rotary and they say, "We ought to just go do one of these things at the Rotary." Rotary only wants you to do a 20 minute talk usually. Maybe you get 30 minutes, but usually it's about 20. What are you going to do? You want to have the person who invited you, in this case your board member, have them be the one who introduces you at the Rotary meeting before you speak.

They are the ones who can say, "I invited this organization to come and talk. I'm involved with them. I think they're fantastic. I've already chosen a date to host a tour, whatever they're called, a mission tour, a point of entry, if you will, that's going to happen in a couple of weeks, I'm going to be hosting one and after Barbara is finished telling you all about this today, if you would like to attend the tour that I'm hosting, come back and see

me at my table.” You see, you don’t have permission at a Rotary-type meeting to ask for people’s names. You do not have permission to get their contact information.

However, the member of the organization and if that’s someone that knows you, presumably someone invited your organization to be a speaker there, they can say that at the beginning and then you get up and you do just 10 minutes, all you do is a little 10 or 15 minute talk that usually includes the visionary leader talk, that same kind of a powerful personal talk from your visionary leader and usually a live testimonial.

Those are the things that people will remember most in your 20 minutes or 15 minutes, visionary leader talk and a live testimonial. Then end by having that rotary member come back up and say the same thing again about, “Thank you so much. If you’d like to come to my private tour I’m hosting in two weeks, come and see me at my table,” like that.

That means that you’ve taken that event, you’re not counting that as a point of entry, that Rotary meeting, you do not call anybody and follow up, only the people who come back and talk to the person and say invite me, those are the people you then invite to the point of entry. That is a pre-point of entry.

So, here you’ve got the box. I’m going to get into the four kinds of events. This box will look familiar. The three items in it are essential to each of the four types of events. So, whether it’s a point of entry or the other events I’ll be described, you’ve got to give people the facts, the emotion and you must have their permission to capture their name.

No more leaving the business card in the bowl for drawing. We all knew what that led to a lot of mail and phone calls we didn’t really want. Guests must be invited word of mouth by an ambassador who tells them in advance that they’re coming to a get acquainted event. They’re not going to be asked for money and they will receive a follow up call. Very transparent. Then I said point of entry in a box as another example, which is not like a Rotary meeting.

Okay. These, again, you’ll be doing twice a month. In our schema of events, you would be putting these on minimum two times a month. So, let’s go now to the next type of event, which is the ask event, the free one-hour ask event. I already explained this, but here’s a little summary of it. This was taken right out of the book. It’s free. You want to aim to have 200 to 300 people at your event, not more than that, 200 to 300. Those of you who are thinking, “We want to have way more,” some of you are thinking, “How are we even going to get 200?”

The reason we don’t want it bigger is because of the metrics, the second item there—minimum of 40% of the guests must have attended a point of entry in the prior year. Earlier I said 50% and I really would like it to be 80%, which is what we had at our first ask event, which is why it was so successful. There’s a direct correlation between the percentage of people who we crassly refer to as the ripened fruit people at the ask event and the amount of money raised.

If you start the model today and you do two point of entry events per month, you will not be able to meet the metrics to do anything much bigger than a 200 to 300-person ask event. If you want to have a bigger ask event, then you need to do more points of entry per month to meet the ratios that I’ve described.

Number three, all the table captains have been ambassadors in the prior year. We would much rather see a way smaller ask event, like 100 people and have 10 table captains who all were ambassadors in the first year, but we don't want to have anybody just being roped into being a table captain at the last minute.

That means that their guests will not have been through the process and actually it can backfire when you start asking people for \$1,000 a year for five years. While it's only \$83 a month, it still is a lot of money for somebody who doesn't even know your organization yet. Even if they should choose to give to you at the ask event, they probably will somewhat be giving to please their friend or repay a debt in some way to their friend whose table they're sitting at, okay?

So, the best time to have . . . word of mouth invitation only. There are printed invitations. Spring or fall, breakfast or lunch. Again, there's that box, they've got to sit down, they get the facts and emotion and you've got to capture their names with permission. There's quite a bit more about this event in the book.

And then this is where you launch your multiple, your giving society. That's number nine. Ten percent of the guests join your giving society each year. That is our metric. If you have 200 people at your ask event, we want 20 of them to join your multiple year giving society. That would be each year, which is why you have to have new people each year at this event. The purpose of this event is not to get bigger and bigger and be the sole place you ask people money for each year, absolutely not.

The purpose of this event is to bring people in to kind of crassly harvest the ripened fruit from just the prior year. Yes, you may invite people who have been multi-year donors from the year before. Of course that's a courtesy. You may invite your board members every year. The focus of the event is on the new donors. So, unless you get a lot of new people coming through the points of entry, do not expect to have this event live on very long at all.

Expect less than 50% to give, that number 11, the 50% correlates with the percentage of the ripened fruit. Many of those same multi-year donors will become ambassadors when you call to thank them right afterwards. Again, most people tell us many times because we're kind of in ask event season, as we like to say around here now where a lot of our groups are having these events for the first time right now and many of them, when they call us afterwards, they're so excited and they don't even tell us how much money they raised. They just go, "Finally, our mission got spoken out in the community. People understand what we do."

I have a man who's been emailing me all morning telling me all the results that he's had that had nothing to do with the money. I'm kind of like, "Tell me the bottom line." He hasn't told me, so I still don't know. The program does the work, so you do not have to feel that the table captains have to pressure their friends to give money.

At no point in this model do we ask board members to ask anyone for money. The program itself, the whole model, the way it's done organically will naturally generate donors. The ones who are supposed to give will give. Okay. We want to have one of these events per year, only one ask event per year. You do not get to have more than that. You will need a full year to ramp up to be ready.

The third type of event is the free feel good cultivation event. I described that to you a little bit earlier. It's got to be free. It's got to be an event you're already having. It might be a recognition, an awards dinner, an annual

meeting. If it's an awards dinner, it's not the kind of where people have to pay a bunch of money and let the donors come for free. No. It would be something that's already free but it focuses on your mission.

If it's an awards dinner, it needs to be . . . for example, we work with a hospital that gives awards for employees that have worked there a certain number of years and are stars from a certain department. That's very moving for people to attend, perhaps it's a celebration, a program-related milestone event, like we have workforce development groups that will have . . . their participants will be graduating or they monthly might have a job celebration when people get hired on.

So, something like that that's really mission-focused. In that case, in fact I'll use the example, stick with that example where they're either sitting down, people are sitting down, let's say you're doing a program there. You're giving them the facts and emotion and then capturing their names. You've already got their names, you want to follow up with every single event you do, you're going to follow up.

So, if you are doing events right now and you don't have the follow up planned in to them, why are you even doing the event? If you don't have that figured out, you have nowhere to track. You will not be gathering any data to track and you probably won't have a place to put it. You've got to be thinking always from why am I having this event? What is it causing to forward my mission? How might it help me recruit ambassadors? You can even have free feel good stratified for donors at different levels.

So, you notice those three different giving levels that we have. You might have a different event, like we had the graduation was just for all of our multi-year donors, those 127 the first year, but we also had a special free feel good event that was just for the donors at that top level, the \$25,000 a year donors for five years. That was hosted in a private home by one of our board members who was also one of those donors, she and her husband hosted it. She was a great cook and had a beautiful home.

But we didn't just make it a nice dinner. We had the principal of the school there. We had a parent there with a child kind of during the reception time. Then they were excused and just at the dinner was the principal with the donors letting down his hair and really talking about the challenges that were going on at the school. That private time with him was what they wanted. It was very mission-focused.

And we do allow donors to invite others if they want to. We don't overdo it on that, but sometimes your donors will have friends that are exactly the people you've been wanting to have come to the points of entry, but for whatever reason they haven't been able to come. So, if they want to invite a person or two to the free feel good, that's fine.

And then we can also use them as a point of reentry for capital or whatever the next stream is. That's where I gave the example of these free feel good events that we use as a way to bring people in for capital. We didn't ask them for capital gifts at the free feel good, but we showed them the architect's drawings.

We told them our vision. We told them why we needed a new building and then we followed up with them afterwards, cultivating them. Only did we ask the ones who were ready to give. We didn't ask everybody who

came to one of those evening events about the new building. We actually listened closely and we found the people who were really interested.

Okay. So, this event, the free feel goods you're going to do twice a year also, two times a year. Then there's another event. I didn't put it on here. It's called a celebration event. We want you to do one of those right after the ask event each year to thank everyone who's been involved with the ask event and kind of launch the next year.

So, two of the traditional free feel good events—again, program-related events that you're already doing. Do not cook up some new event. The last thing you need is to cook up a new event. Think of something you're doing in your program. There are some good examples in the book, in that particular book.

Okay. Item number four, event type number four is what we call the point of entry conversion event. This is the one you've all been waiting for, I'm sure, because you want to hear what are we going to do with all those other things, those events we call fundraisers, the gala, the golf tournament, the events that people pay for and think that they're coming for a golf tournament, right? Those events you call fundraisers.

So, the real test for us is can the guests answer these two questions after they go to your gala or your golf tournament. What is the name of the organization that that event benefits and what does that organization do anyway? So, they may seem kind of silly, but we find some people just are golfers and they'll go to a golf tournament of the week and they don't really pay much attention.

Maybe they pay their fee to be in the tournament, but they don't really care or know about the organization. No one really has taken the time to do what's boxed in there, which is using the golf tournament as an example at the dinner or the lunch, usually wherever the awards are given for the golfers. People are sitting down, right?

Right then, during the program, you're going to say to people—in fact, I've got a little script for it. Let me move ahead here to this slide. Let's see. I don't know if I can advance to slides like that. I'd rather do it this way. Okay. Here we go. This is an example. This is the wording to use when converting a fundraising event like a golf tournament or a gala to the point of entry conversion event.

That's what we call this. We want to have the MC or the board chair say at the beginning of the lunch part or dinner or after the golf tournament, we here at this organization wouldn't be doing our jobs if we didn't take advantage of having you all gathered here today to tell you a little bit more about the work we're doing. Look, you've had a lovely day of golf. You've had a lovely dinner. We just want to take five minutes to tell you a little bit about what we do here. Maybe it's ten minutes. I say ten minutes is the about the longest you can actually commandeer the program.

So, visionary leader talk, that usually takes about five minutes and then the three-minute testimonial speaker. That's what you would be doing. Then to wrap up the program, the board chair comes back up and says, "Now that you've learned a little more about our work, some of you may find you'd really like to learn more about our work first hand or just be kept informed of what we're doing. In that case there's a card under your plate and pens in the center of the table for you to fill out.

Then if you've been moved and inspired as you're filling out the card, you can say this to them. If you've been moved and inspired by the message you've been hearing today, we'd love to have you come to our point of entry and this is the one-hour dynamic tour and you give them all the details there and even have people say, 'I didn't realize,' some of you may think that you know about this organization, but I didn't realize it until I took the tour. So, come and learn about it. We'd love to have you fill out the card."

And then train the people who will be collecting the cards to be upbeat and gracious with people, something that is inviting. They can say something that is inviting to their table to make it easy. If you've organized the dinner at the golf tournament, you've got like one of your close end people sitting at each table and they can be sure that this happens there. So, only those people who fill out that card and give it back and leave it under their plate or however you set it up are the people you have the permission to really call and invite to your point of entry.

So, this is a point—we call this a point of entry conversion event. It's a fundraising event that you call it a fundraising event and we call it a point of entry conversion event and we would like to see none of these going forward.

Now, I know realistically we've got a great one. It's your 40th anniversary. We do this every year and such and such board member really loves it and we could never consider cancelling it. That's fine. That's why we're going to move on now to look at how to put this all together and figure out what to do with those events.

So, we go to page 33 in the book, the soul searching questions. There are 17 of these. I know that Bloomerang posted a blog post I did. I think Steven there were nine of them that you posted there. Those are selected from these 17, but the book has all 17 in it. So, these are the kinds of questions designed to help you when you're trying to explain to a board member or other staff why that event might be worth analyzing for its real bottom line value.

Why are you having it anyway? Why are you having the event? Is it really expected to raise any money? What have you said in the past to justify that you haven't reached the goal? I can't tell you how often we talk to people who go, "Yeah, it's supposed to raise \$200,000 every year but we kind of skim by with \$70,000 and really it costs us quite a bit to put it on." So, how do you justify it? Not reaching the goal. The weather, we started too late. How attached are you to this type of event? Everybody does it every year.

This number five is key. What if someone just walked in and wrote you a check for your goal? Would you still have the event? This is really the deciding question to boil down all 17 into one. And some of you right away would say, "Yes, we would still have the event, even if somebody gave us the money. That's a sign that it's building something else for you besides money." Some of you would say, "Heck no. We would ditch that thing right away. You'll know the answer to number five, usually right off the bat."

Thinking ahead to next year, next big event. If you don't make the goal, why wouldn't you? A lot of people already know, they already have their reason and excuse for why it's not going to work. If it's supposed to be a fundraising, do you actually know how much it nets? How much work did it take? How many volunteers to put it on? If you've got dedicated fundraising staff, what else could they have been doing with the same amount of time and energy to bring in more money than that event nets.

That's really the second key question here. We find by the time groups have been using our model for a number of years, they have so many major donors and they can't even have the staff . . . they have staff and they have donors, but the staff don't have time because they're busy putting on these kinds of events. Think about the opportunity cost of having those staff sequestered while they're putting on these events rather than getting out there with donors.

For how many months, number ten, in advance have you and your team been obsessing about the event? People get really ill over planning these events. I was on the phone last night with someone until about 9:30 last night trying to counsel her through an event she's putting on that she doesn't know how to manage all the politics around this thing.

And number eleven, do you know from the beginning that you have big fixed costs to meet? Are you talking about filling an auditorium or a theater? Do you have to sell tickets? Are there certain minimums that have to be met before your organization nets anything? Is it the right kind of event for your organization?

We have groups that we have a number of faith groups that will put on a number of things that involve gambling. We have the homeless group that puts on an event that's a tour of the big fancy homes in town. Think about it, from the perspective of a guest, does this even make sense? Does it give you enough predictors for the results? Are you just kind of biting your nails and crossing your fingers until the last minute to see if you actually broke even, let alone made any money.

Fourteen, is this the best way to maximize the giving potential of each donor? I was talking to another man this morning. His organization puts on a big gala every year. It's a big hospital. He said people come and they buy a bunch of stuff at the gala, the auction and then they think they're done. They think that's their gift to the hospital every year. They don't realize—there's so much more potential from each of these donors.

What would you think if you had to sit through that program? Sitting through an auction is not everybody's favorite thing or a long, drawn out group of speakers. What are you building for future years by having the event at all? On a scale of one to ten, are you even excited? How excited are you to put on the event? These are questions that are in the book that I really recommend you spend some time with your board and with your events team looking at and use them to educate people about this takes work. We are sacrificing something by putting on this event.

By doing this, we are not doing other things that could help us if we really wanted to deeply engage people. Again, just going back to number five, if you were to focus on any one of them, what if someone just walked in and wrote you a check for the total goal? Would you still even have the event? That is the key question here.

And then to move us towards wrapping up, here's how we recommend that you design all of this into a system. This is a little chart, it's in the book. Across the top, it's got the categories of events I just described and on the left, you're going to list out the events that you're now doing and decide what you convert them to, which month ideally and on the far right column, by when are you going to do that. The next slide here shows you an example of a group that we worked with. There's number on the left, the golf outing. So, they decided they're going to eliminate that now.

The corporate sponsored gala auction, the second thing on the left there, they're going to turn that into a point of entry conversion event. They're going to have it be in March and the first year, they're going to convert it to that event but they're going to eliminate it all together in the second year.

A lot of times when groups start using the Benevon model, they are able to eliminate those pretty quickly, although we don't require it, but a lot of people say, "Wow, we don't really need that anymore." Graduation, they're going to turn into a free feel good event right away and then those other two things that they do, they have chess classes and tutoring sessions, they're going to use those and pull them into pull them into tour stops for their monthly point of entry events. So, it's just going to be part of the tour stop.

So, that gives you an idea of how you can take the things that you're already doing and the charts right there in the book and convert them so that you're inserting the mission and everything you're doing is building towards something bigger, not just feeling like you're on that treadmill year after year.

Okay. I'm going to stop in a minute. Let me just say a little bit about what we're going to be doing after today, and then we'll take some questions if that's all right, Steven.

So, first just to say the blog post that Bloomerang posted was one "Nine Soul Searching Questions." That came out yesterday or the day before. The next blog post I sent them is what we call "How to Bless and Release a Cherished Special Event." Some of you are thinking, "Well, this is very nice, but what do I really do about my event." So, there are some tips in that next blog post coming out.

And then after today's webinar, you'll get a little one question survey that you're going to be asked to fill out. If you do answer the one question, we're going to send you an eBook, which is Chapter 3 from this book. So, you will get a free Chapter 3 from this book, which describes a lot of what I've covered today.

But if you want to get the whole book, we are offering 10% off of it until April 30th. So, you've got a little over a month if you'd like to order the book. The way that you do that is just go to benevon.com/offer and you'll get 10% off of this book.

So, I think that about does it. Steven, I'm ready for questions. You take it away.

Steven: Awesome. Yeah. That was great, Terry. I always love hearing about this model. One thing I kind of wanted to brag on you, Terry, if you don't mind. Benevon publishes all this and they kind of give away their model for free. Terry, is it right that you have a lot of people that follow the Benevon model that aren't actually paying clients of yours and you don't even really know who they are out there, but they're raising lots of money?

Terry: Absolutely yes. Many of them have now discovered Bloomerang and they're using the Bloomerang for Benevon modules already. It's really been very exciting. Whether they come to Benevon or not, they still can use the books and the software.

Steven: Yeah. It's really cool. A couple people have asked this, Terry, and it was a question on my mind as well that I'd been kind of thinking about as I'd been learning about Benevon the last year or so—why do you focus on

the pledge? Why don't you just ask for a one-time gift or let people kind of give however they want, whatever they want? Why do you focus on the pledge? Can you kind of explain that philosophy?

Terry: Yeah. The pledge is not even about the money. The pledge is about the pledge. It's about someone saying, I'm with you on the mission. Come back and talk to me. People, there's that fill in the blank box right on the pledge card. People can easily say, "I'll give you \$1,000 a year one year at a time." But by virtue of the fact that they choose that box that they're going to do it for five years, they're saying to you, "I really care." You're not going to take them to jail if they don't pay it off every year.

It's not like a signed contract, but it is their pledge. It's their way of saying, "I'm with you on the mission. Come talk to me. Include me. Ask for my advice. I'm not necessarily going to give you all the money you ever ask for." The reason we use it and it's so powerful in our model is it allows you to identify who are the people that want to be further cultivated. They're kind of in the inner family of the organization. So, you don't have to wonder, "Of all my donors, who am I supposed to talk to today?"

Once I had my 127 best friends at the school, I stopped doing everything else. I said, "If they can give that kind of money at a one-hour event, even though they've been well-cultivated, but it was still a surprising amount of money, what would happen if we got to know them even better?" Those are the people I focused on for the free feel good cultivation event.

Steven: Okay. That makes sense. Lots of people have asked how much do these events cost, on average? Obviously you're feeding people and you have to have the event space. How much do they cost and how often should you have point of entry events? Is it once a quarter, once a year, once a month? Is it across the board? Cost and frequency, what do you think?

Terry: Okay. I'm going to go back and see if I can find the model in here. I've got to go way back on the slides. Here's one. Okay. The frequency is, just using this slide as an example, the golden color, number one, you want to have two points of entry, not points of reentry, two points of entry per month.

In the red, for the ask event, you want to have one ask event per year and in the blue, the free feel good, you want to have two of those per year. So, that's how often you have them. As far as the cost, the ask event, that's the one most people are thinking they picture some big expensive thing. Yes, we'd like you to have it at a nicer place, not necessarily nicer, but at least a different place than your office.

We'd rather you'd have it a little bit special. Usually because it is a pre-plated breakfast or lunch, a continental breakfast, usually a cold breakfast, there's not hot eggs and bacon, people are there for one hour. It's quite inexpensive. We figure maybe \$25 a person for the breakfast, if you do it that way. That cost, when you add that up, is significantly less. Again, it's not a huge event. Often you'll get a sponsor for the event to cover the cost.

Steven: Cool. Here's one from Kimberly and I kind of wonder this myself. What about organizations, Terry, that don't have a brick and mortar location where maybe a tour or an in person visit would be difficult. Any advice for organizations like that that maybe don't have that physical space?

Terry: Yes. We love that. In fact, I don't know that . . . well, it might be in this book. I'm not sure. There's another book we have out too. In the package, you'll see it when you go to the website. I'm hoping you'll poke around there. The other event at the point of entry . . . Wait a minute. I just lost my train of thought. Ask me again, the question, Steven.

Steven: Non-physical locations.

Terry: Yes. Thank you. There's a whole section in there called what to do if you have either a boring office—we call it boring office syndrome point of entry. That's written up in there, also what to do if you don't have one at all. The short answer is you have it in someone's home, a church basement. You do a point of entry in a box if you don't have any physical location at all. There's a whole section about point of entry in a box.

Some of you may be thinking, "We do have an office, but we would never want to have it there." Yes, you probably would initially. We would like you to. There are sections in the book describing it. But even if you do it in a little tiny run down conference room, we do what we call a four corners point of entry, where you're sitting at the roundtable and have signs and posters and props that demonstrate the stories and such from each bucket that you would normally do on a real tour. Okay?

Steven: Okay. That makes sense. We've probably got time for one more question because we're going up on the 4:00 Eastern hour. The asker asked to remain anonymous. What if your ED or your CEO or founder is not a great speaker but you definitely want to have that person telling the emotional story? Is it okay to choose another representative from the org or does it happen to be someone at the top or in leadership?

Terry: Yes and yes. It is okay, but yes it has to be someone in leadership. Really the guests at the point of entry must hear from the CEO, the visionary leader even if they're not a great speaker. They've got to meet them, but we can . . . if people come to our trainings, we coach them in how to be emotional and visionary, we help them or find another person who can do that part of it.

Steven: So, you wouldn't be afraid of investing perhaps in training.

Terry: No. Most people who are visionary leaders, they've got a big vision but they didn't necessarily get trained to be public speakers. They got trained to run an organization or be good at the field they're in. We're very accustomed to that. Do not let that stop you at all. Honestly, if we really just have them talking about the mission, which is what they love to talk about anyway, they can be pretty good. We can help with that.

Steven: Cool. Well, I know we did not get to nearly all of the questions. Terry, would you be willing to take additional questions maybe via email or by phone?

Terry: You bet. That's fine. Have people send them over. Yeah. And don't forget about the survey and the eBook. Hopefully that eBook at the end will be helpful to you all. It's something I wanted to give away, the Chapter 3 in this book. You can get the whole book. You see how to do it right there.

Steven: Yeah. I'm going to send out Terry's email through the chat and we'll definitely be sending the slides out to you folks as well. Terry, this was awesome. Thanks for sharing all your knowledge with us for free. This was really great and I hope everyone enjoyed the presentation.

Terry: Thank you so much for having me, Steven, and I'm really grateful for our relationship with Bloomerang. Thanks again.

Steven: Yeah. I just want to kind of brag on that for a minute. We have a special version of Bloomerang if you are a Benevon model follower. We have a flavor of our database just for you. Check out bloomerang.co/benevon. Definitely download that eBook, get that coupon code. Lots of free resources on our website as well. You can check out our upcoming webinar schedule. We're going to take next week off for spring break.

Hope you don't mind, but we are back two weeks from today, a special 10:30 a.m. Eastern edition. I know that will be early for you West Coast people, but if you don't mind getting your day started with us, it's definitely going to be worth it. We're going to have Jen Love and John Lepp of Agents for Good on to talk about donor love. Maybe you've heard that donor love phrase and you've been seeing that around conferences or Twitter and you want to know more about that.

Definitely check it out, they're going to talk about donor stewardship. It's going to be a really good presentation. There are a couple other webinars on our schedule as well if you want to look further on to the future. We'd love to see you again some other Thursday, hopefully in two weeks. But if not, we'll call it a day there.

Have a good rest of your afternoon. Look for an email from me with all the goodies and do email Terry with any additional questions. So, have a great rest of your day, have a great weekend and we'll hopefully talk to you again soon.

Terry: Bye, bye. Thanks again, Steven.

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