In This Chapter

- The role of events in your annual giving campaign
- Social media as a driver for your annual giving campaign: Twitter and Facebook
- Email marketing and creating an online presence
- Connecting special events and online activities to giving throughout the year

Steps included:

A. Special Events

Step 1 — Set the goal to be raised and the steps for achieving it

Step 2 — Set a goal for new prospective donors to be identified and steps for achieving it

Step 3 — Set goals for contact with current and lapsed donors to increase connection and readiness to give

Step 4 — Plan the logistics of your event

Step 5 — Assess the event
Overview

What do special events and social media or your online presence have to do with one another? Why are they all in the same chapter? All of these fundraising techniques have the capacity to:

- Fill your pipeline with new potential donors to your Annual Giving Campaign
- Provide a powerful platform for your message and creating a tangible presence in your community
- Raise needed funds for your program.

But all also need to be actively connected to other actions throughout the year to turn these intersections into meaningful, sustainable tools within your Annual Giving Campaign.

(Yup, there it is. The statement you’ve been waiting for: special events are ONLY A TOOL to be used to raise annual giving funds. They are not a separate program but something to implement in the right “doses” in order to achieve to overarching goals you set for your annual giving campaign.)

1. Which of your events have the greatest potential to raise more for you than they do now? Are there some that you run that have been growing over the past couple of years? Or are such a terrific idea or terrific locale that they could do more than they do now if you had time to focus? Put this on your list to potentially keep.

2. Are there some events that have yielded more “high quality” prospective donors than others? Do some events attract the kind of potential leadership donor that you want to build on-going relationships with? Also put these on your potential “keep” list.

3. Are there some events for which someone in your community feels great ownership? If these events also meet the criteria above, keep them on the list. If they don’t you’ll need to start building the case for why there are more effective ways to deploy your resources and a strategy for sharing that case with your volunteer leader. Focus on paring down the special events portfolio to a manageable number that support your program—rather than pulling your resources in too many directions. And, read on.

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We are one of those programs who are really heavy on events through the year. All of our events raise $5,000 or $10,000 a piece and we have six or seven of them planned throughout the year. I can’t see how I’m going to implement the kind of plan outlined here and keep up the pace with these events.

The short answer is: You can’t. Unless you’ve got a large staff, and at least one person dedicated to running all of those events, you are going to need to make some choices. And even if you had the staff available, would you really want to dedicate that person to organizing a bunch of events that likely don’t raise enough to cover that person’s salary? To move to a more comprehensive Annual Giving Campaign plan, one that helps you grow in the areas that you know will make your revenue more sustainable, more predictable and better able to support the long-term growth you need, you must give up the focus on most of those events. Make the couple of events that you do work as hard for you as you do on them. Here’s how to get started prioritizing:

REALITY CHECK:
For all of these techniques, having a complementary plan—an offline plan to engage potential donors who find you online; a pre- and post-event plan for solidifying relationships built through special events—will enable you to maximize the investment that you make in using these tools wisely. Without that complementary plan, your plan risks backsliding into retention issues as special event donors drift away to other interests, or online donors lack a firm connection to the organization “in the world”, outside of your online presence.

It is not mandatory that you include all of these elements on your own plan. Most find that a sensible number of manageable events are an important complement to their Annual Giving Campaign plan, though not all launch a major fundraiser (a gala or golf outing) because they find that this is not a time effective way to deploy limited staff and/or volunteer resources. Increasingly, every plan should include a dynamic, interactive website that provides resources to potential donors and an online giving option because it has become the baseline expectation of most donors now. A number of programs have begun to use social networking successfully to broaden their network and raise some funds, but this is clearly the area of giving that is most “in flux”, growing rapidly in new directions over the next few years.

Step-by-Step Actions

These Step-by-Step Actions are divided into three sections to reflect the different actions you need to implement to achieve powerful special events, online marketing and/or social media outcomes as part of your annual giving campaign.

**SPECIAL EVENTS STEPS**

**Step One—Set the Goal to be Raised, and Steps for Achieving It**

1. If you are looking to raise a significant amount with your fundraising event—over $30,000—building a table of gifts for your events can be a powerful tool for managing your progress on this “mini-campaign”. With a table of gifts, you can identify key underwriters, sponsors and the number of tables or foursomes that you need to sell to hit your target goals—and how many prospective donors you have identified toward those goals. Everyone who appears on this table of gifts should come from your overall projected table of gifts—remember that this is a way to close gifts toward your overall goal.

- If you are not anticipating that you will raise $30,000 in your special event, give serious thought to ways you can either increase that total or disband that event in favor of more time and resource efficient methods of raising those funds.

2. Using your table of gifts, identify which gifts you can solicit face-to-face in advance of that event. Certainly this should include your event committee, any honoree and your sponsorships. Don’t limit yourself to this list though. By soliciting early, you not only have the opportunity to build relationships that exist outside of the months around the event itself, you also have the opportunity to highlight any issues this event’s success might have early on, while there is time to make a course correction. Sure that you’ve got 10 people who are willing to buy tables as their gift, or as a part of their gift? Get those pledges locked in early so you can plan both the event and create Plan B without nasty surprises.
3. In addition to the overall fundraising goal for the event, the event should also include message goals. How will you use your case for support to inspire the attendees you have present? Every event should include multiple “Think”, “Feel” and “Do” messages. Your “Think” message addresses the core information you want your attendees to leave the event with, this might include overcoming misperceptions or myths about what you achieve, or the kind of organization you are (a “hot” cause, worthy of major gifts, etc…). The “Feel” message is that emotional tug that you will communicate through the event using testimonials, the presence of your youth leadership (if appropriate to the event), video, photos, etc… And every event must have a “Do” message—what do you want these attendees to do as a result of attending this event?

For much more on developing a message plan for your event—before, during and after the event—go to the in-depth resources on the Fundraising Toolkit for much more on this topic.

4. Identify what additional goals you have for the event. Is the purpose of this event to introduce new prospective donors to your organization? If so, take a look at the next step. Is it to change the perception of your program in your community, raise the stature of the services you provide or simply broaden the number of potential families who know your services exist?

Beware the generic “outreach” goal for special events! Set very specific, measurable goals around the “marketing” or “PR” purpose of your special events. A goal to “Increase visibility in our community” is not specific and is not measurable: increase visibility with whom? Why? To what end? How will you measure whether you have achieved this? And how will this serve the success of your Annual Giving Campaign—what is your follow-up plan to turn this “visibility” into giving?

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**Step Two—Set a Goal for New Prospective Donors to be Identified, and Steps for Achieving It**

1. Well-planned, special events can make a measurable impact on filling your pipeline with the right donors and helping you to create a more balanced portfolio. Set specific goals around the potential donors you are seeking to attract to this event—individuals, corporate partners or foundation decision makers (or some of all of them) and at what level?

2. Is this event designed to bring new $1,000+ donors to your program? Lower-level donors? Your goal and your plan for implementing your event need to match. Think through whether you’ve got the right venue, timing and host to achieve your financial and “filling the pipeline” goals.

3. Think through what the right message is or who the right person to invite might be to attract the people you want to this event. You may send an invitation broadly to larger group, but target specific outreach messages—one a personal note included in the invitation or in a follow-up phone call—to your most promising prospects.

4. Strategically network amongst your volunteers to assemble the right invitation list for this event, then assemble and research a list of the top 10 or 15 of your “Critical Few” are who will be attending this event.

5. Pre-plan your outreach steps to the 10 or 15 on this “Critical Few” list so you will maximize the time you have them at your event to create ways to follow-up after the event. Who will reach out to them? What questions do you want this person to ask? Who do you want to make sure they meet at your event? What messages do you want to ensure they hear?
6. And pre-plan your follow-up from the event—for everyone in attendance and for your Critical Few. **If you do not have a follow-up plan from your event, do not bother doing it.** The “Do” message you send should invite everyone in attendance to take action on your part: make another gift when asked, take a tour of your program in action, volunteer, say yes when you call to make a follow-up visit.

**Step Three—Set Goals for Contact with Current and Lapsed Donors to Increase Connection and Readiness to Give**

1. To make this event a high-quality tool—a part of an on-going strategy, a point of conversion, a point of entry, or an opportunity to deliver great stewardship—you must have a plan for how you will work the room during and after the event.

   A great event should be used as a way to raise people’s sights, and engage the right people in a deeper relationship with you. Your strategically planned event offers an opportunity to:

   - **Engage** the host at the highest level,
   - **Make introductions** to your work and impact to powerful and influential people in your community
   - **“Work the room”** and make contact with many people in a short time
   - **Recognize** and steward current donors during the program portion of your event or personally over the course of the evening
   - **Engage** some attendees more deeply as you seat them strategically near leadership or program staff
   - **Inspire** some to open their network to you or underwrite a significant cost of the event by honoring them or offering an award for service

   Your special events may also offer you the opportunity to forge new alliances with program leaders as you showcase their work at the event. As well, some donors may enjoy making an increased gift to underwrite the cost of tickets for program staff or youth leaders and their families at your event.

2. Start by recruiting a team to help you work the room. A volunteer reluctant to come to the event, or who is having a difficult time getting involved in fund development, may be willing to attend and participate if you ask them to play a specific role with three to five prospective donors in attendance and provide a briefing on what to accomplish. The team of those who have specific assignments and briefings to direct their work should include:

   - The implementation and evaluation leads
   - As many members of your program staff as you can recruit
   - Any Board members and key special event committee volunteers
You should each have a list of five to seven, each volunteer should have a list of three to five. Add in a couple of program staff members or other volunteers and you could make personal contact with 25 or 30 of your potential Critical Few in one evening!

3. Before the event, create a follow-up plan for everyone and for your Critical Few. Will you send a follow-up letter or email of stewardship a month after the event? Will you invite everyone to take a tour or attend another mission-focused event? When will you solicit an outright gift from everyone? For your Critical Few, who will follow-up with whom? Will it be by phone call? Will it lead to a face-to-face visit? What supporting materials do your staff and volunteer partners need to achieve that?

4. Before the event, set a time when you’ll debrief with all of your staff and volunteer partners. Gathering everyone face-to-face or on a conference call is optimal but schedules may require that you follow-up with each one individually.

Step Four—Plan the Logistics of Your Special Event

1. Of course, you also need to have a plan for the logistics of the event itself—and any event has many moving parts!

For more on logistics planning in your event, visit the Fundraising Toolkit resources!

Step Five—Assess the Event

1. First assess your event against the goals you set. Did you reach your fundraising goal? Was it closer to the $25,000–$30,000 mark? Did you identify and engage the number of prospective donors you wanted? Are you fulfilling your follow-up goals?

2. What was your return on investment for the event? How much did it cost to raise a dollar—including staff time? Your event should cost $.20 or less per dollar raised.

3. Sharpen your goals and implementation plan. Make notes on what went well and what needs improvement next year.

Social Media

4-H has become an active participant in social media communities, where we have built a strong community of individuals who wish to participate in positive, productive conversation. The 4-H Online Community includes the 4-H web page, 4-H Facebook page, and 4-H Twitter feed, and is managed and monitored by National 4-H Council.

The information presented on the following pages offers a very basic overview of the ways you may want to consider using social media as part of your program outreach, and potentially even your fund development. You may also find that your state has already cultivated a social media presence that can be used use to help promote your Health Rocks! program. Be sure to speak with your Principle Investigator (PI) as well as your state’s 4-H program and fundraising leadership about the most appropriate ways to do this before embarking on any of the strategies that follow.
Creating a Presence on Twitter

1. This is an appropriate role for the program leadership—especially youth leaders. It is not the way you’ll raise funds but it can be a way to create a following and send people to your site or contact you for more information on giving or volunteering.

2. If you are not familiar with Twitter, start by getting on and “watching”—or reading how others are using it. What are they doing that attracts you? What makes you stop reading?

You can begin your exploration of Twitter by signing up to follow 4-H: http://twitter.com/4h

3. Spend no more than five or ten minutes a day on Twitter and think of your “tweets” as an ongoing newsletter or chance to expand on or share a story that appeared in the news.

Using Facebook to Raise Awareness (and Potentially Funds)

1. Create a Facebook page—the Causes section can be great—for your program where you can post information about your events—house parties, or open houses (but probably not your gala). It is also a place where you can post articles that interest you and your followers and share your story broadly.

2. Your supporters—donors, volunteers—can use their page to generate money for you. Engage those who are on Facebook to use their birthday status update, for example, to direct their friends to give to you, instead of a birthday gift.

3. Think of Facebook as parallel to the way that the “Livestrong” bracelets or the “Red” campaign enabled people to be visible in their support of organizations that are important to them.
Email Marketing

According to Network for Good, the Internet’s largest online giving portal, online giving has grown from $250 million in 2000 to more than $4.5 billion in 2005, with continued increases predicted. Studies also show that online donors give significantly more than “offline” donors, with an average individual gift size of $163 versus the average “offline” gift of $124. Clearly, email marketing can be a powerful, fast and cost effective way to engage your Health Rocks supporters and improve your fundraising results. However, long gone are the days when you could simply craft a message in Microsoft Outlook (or whatever email application you happen to be using), add your nearest and dearest as recipients and hit “send.” (In fact, if that is what you’re still doing, stop it right now!).

A successful email outreach and fundraising strategy, much like the rest of your annual giving program, requires careful planning as well as the time and resources to see it through. Just as with the preceding social media section, you will want to speak with your Principal Investigator as well as your state’s programming and fundraising leadership to determine if you may be able to access the technology and services (such as an email marketing service provider) that your 4-H program and/or land grant university are already using for their email outreach as well as the goals for your own email marketing effort.

With this information in hand, you can begin laying the foundation for success in a few, easy steps. Below are two great resources which offer valuable best practices and tips to get started:

The Seven Things Everyone Needs From Online Outreach—http://nten.org/blog/2008/04/22/the-seven-things-everybody-wants

The Nonprofit Email Marketing Guide: Seven Steps to Better Email Fundraising and Communications from Network for Good—included in the Tools, Templates and Samples section of this Annual Fund Guide.

Creating a Donor-Centric Aspect to Your Health Rocks Webpage

1. Many donors come to your program’s web site or page to find out more about you before they give offline, or for a quick and convenient way to give online. Conduct a self-assessment of your webpage: start from your landing page and put yourself in your donors’ shoes. What attracts you? Where are you drawn? If you have questions about what to give to or why to give, is it clear where you should go? Is there a “space” on your page for donors?

2. Use your webpage to deliver broad stewardship messages about the overall impact of giving.

3. Include your case for support throughout your site—in sidebars with photos of your program in action, on your program description pages. Rather than setting aside a single spot called “Case for Support”, infuse this message throughout your site.

4. Make sure you have lots and lots of photos that demonstrating the impact of giving. Often organizations will post photos from their recent fundraising events—fine to do but the people who will be most impressed by that are the people in the pictures, not other donors looking for reasons to give to you.

5. Also ensure that there are opportunities to advocate, to volunteer, to take a next action with you that are easy to find and linked to the giving online section. Include information on upcoming events and the opportunity to sign up or get more information.

With this chapter is an article from Convio, a vendor of online management software. This article includes a focus on online giving to support Walk/Run-type events (a major part of their market), which is not a recommended technique for raising annual giving campaign funds at most programs (you need major resources behind this type of event to launch it successfully). However, this article includes so many other great resources and tips that it was important to include, with that caveat.
Summary of Key Points

The key to special event and online success is forging that connection to an on-going relationship. You must have a follow-up plan for your special event, email appeal, or online presence to create success in your investment in this area.

All of these techniques are powerful ways to create a “point of entry” to your program, a vital thing to do for continued growth when accomplished strategically and in balance with the rest of your yearlong plan.

But these activities generally bring the lowest return on investment and time, so do as much as you need to accomplish your “filling the pipeline” goals. Go back to your projected table of gifts to remind yourself how much is needed. You should not spend your year in constant donor acquisition mode.

Tools, Templates and Samples

<table>
<thead>
<tr>
<th>Special Events and Social Networking</th>
<th>Special Events Planning Template</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Online Fundraising Guide from Convio</td>
</tr>
<tr>
<td></td>
<td>Powerful Engagement @ Events</td>
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<td></td>
<td>Point of Entry Events</td>
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<td>Mission-Infused Fundraising Event Resource</td>
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<td></td>
<td>Special Event Assessment</td>
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<td></td>
<td>The Nonprofit Email Marketing Guide from Network for Good</td>
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