AWARENESS EVENTS

CREATIVE EVENT INTRODUCING CASE FOR SUPPORT
NON-FUNDRAISING OPPORTUNITY

Effective ways to increase fundraising in your Lodge and Community
Six Keys to a Successful Key Donor Awareness Event

The river of philanthropy is deep & wide and there will always be generous people who will amply support your great dream backed by a sound plan if...

...THEY KNOW ABOUT IT

SUCCESS KEY #1 – Map Out Your Success In Advance
SUCCESS KEY #2 – Provide an Event Experience That’s Unique
SUCCESS KEY #3 – Invite the Right People
SUCCESS KEY #4 – Invite the Right People in The Right Way
SUCCESS KEY #5 – Make Sure Your Moment Is Spectacular
SUCCESS KEY #6 – Make A Promise...And Keep It
WHAT IS AN AWARENESS EVENT?

An awareness event is a uniquely creative breakfast or lunch moment that highlights a nonprofit’s mission and compelling case for support. The purpose of an awareness event is two-fold. First, it creatively invites the “RIGHT PROSPECTS” to learn about your mission. Second, it encourages your “EXISTING SUPPORTERS” to participate at a higher level. Quite often, an awareness event will be the first time a community leader, foundation executive, corporate head, or individual of gravity, wealth, and influence experience your important mission. Awareness events are not fundraising events. This fact is made very clear in the invitation so as to remove any obstacle that would prevent a prospect from meeting you for the first time. Finally, when an awareness event is executed properly the “right” new friends take a step into your nonprofit universe and become:

a. Board Members  
b. Committee Members  
c. Campaign Cabinet Members  
d. Campaign Visitors  
e. Foundation Givers  
f. Corporate Underwriters  
g. Major Donors  
h. Legacy Givers  
i. Local Church Advocates  
j. Performance Volunteers  
k. Event Table Hosts  
l. Advisory Council Members  
m. Board of Reference Members  
n. ...and much more

Awareness events generate a first point of contact with the future “Champions” your organization needs to realize your mission in ways you never thought possible.

The diligent work invested in hosting a successful awareness event is only as a valuable as the time your nonprofit invests in crafting a compelling case for support. One of the most important moments during this breakfast or lunch gathering will be the way in which introduce the project case for support and the associated dollar amount is introduced. The “case” must be presented in a way that considers the audience members’ goals and desires above the needs of the nonprofit. Remember...money “chases after ideas” and there will always be generous people who will amply support your great dream when it’s backed by a sound plan.
SUCCESS KEY #1
Map Out Your Success In Advance

Develop a task map to ensure important tasks are accomplished prior to the event. Outline the different tasks that need to occur in order to host a successful awareness event. The following example may be easier to understand if reviewed from the bottom up.

When developing your own task map purchase four dry-erase 90 day calendars with sharpie-sized dry-erase multiple colored markers. Four 90 day calendars provide one year’s worth of advancement overview. (It is very important that four 90-day calendars be purchased and not a single one year calendar. You’ll need the larger per day spaces on the 90 day calendar in order to do this job right).

DUE DATE: TASK:

April 28  Awareness Event Day
April 27  Event program delivered day before event day
April 27  Case document delivered day before event day
April 20  Upload RSVP’s to Wealth Engine
April 15  Written copy & art for event program and response device due to printer
April 10  Write & create art for response device
April 10  Write & create art for event program
Mar 21  Final case mock-up & art due to printer
Mar 14  Write copy, gather photos, create art using “Case Checklist”
Mar 1  Determine, request, & secure commitments from program participants
Feb 21  Invitation drops in the mail (8-10 weeks In advance)
Feb 7  Name & address data file to printer (2 weeks before drop)
Feb 7  Invitation artwork to printer (2 weeks before drop)
Feb 7  “Host Committee” finalized (members’ names go on invitation)
Feb 7  Event venue must be secured (location goes on invitation)
Feb 7  Special speaker confirmed (speaker featured on invitation)
Jan 17  Creative awareness event theme determined (affects venue selection)
Jan 10  Case concept & project concept finalized (affects creative event theme)
Jan 7  Begin originating lists, purchase rented Lists (file due to printer 1 month)
Jan 7  Upload internal mailing list file to WealthEngine
Dec 10  Board begins strategic planning process to determine “Case for Support”
SUCCESS KEY #2
Provide an Experience That’s Unique

How do you increase attendance at your non-fundraising awareness event? Remember, a prospective donor’s time is valuable and you’re competing with other local nonprofits for their heart and mind. The amount of energy an agency places in the creativity of the non-fundraising event will measurably increase the number of individuals who join you for the first time. The following list of awareness events will provide ideas to consider as you create your own.

HIGH TEA AT THE MUSEUM

Girl Scouts (building courage, confidence, and character in girls) - Hosted "High Tea at the Museum" with sixty former winners of the “Women of Distinction” Award. The tea was held at the State Museum at 4:00pm featuring an exclusive exhibit of vintage Girl Scout Uniforms from the past century.

YOU’RE BEING SENT TO BULL STREET

Federation of Families (serving youth with learning differences labeled as mentally ill) - Sent an invitation to local leaders declaring "You’re Being Sent To Bull Street" the largest asylum in the Southeastern U.S. located on Bull Street in a Southern city. Lunch was served in a hospital lock down facility cafeteria.

MAYOR’S PRESS CONFERENCE AND PRIVATE LUNCHEON

Parenting Partners (providing parent aides and classes to families in poverty) - Hosted a "Mayor’s Press Conference and Luncheon." An invitation only luncheon featuring a press conference MC’d by the Mayor announced a re-brand of the organization by changing its name from Prevent Child Abuse to Parenting Partners.

THE BIG GORILLA IN THE ROOM RECEPTION

Domestic Violence Coalition - (serving abused women) hosted "The Big Gorilla in the Room Reception" at the Riverbanks Zoo & Garden Gorilla Exhibit. Light hors d’oeuvres were served after work for small groups of philanthropists. The small venue created intimacy and a safe place to address the painful issue of violence against women.

LUNCH BEHIND BARS

Friends of Juvenile Justice (serving incarcerated youth) - Hosted "Lunch Behind Bars" for community leaders inside a Juvenile Prison. Six months later this non-fundraising event was followed with a creative "ask" event hosted by the Governor at the same facility. Prospective donors were asked to join FJJ for "An Evening In A Gated Community".
MEET ME ON THE BOULEVARD

Urban Service League (serving inner city youth) sent an invitation to local leaders declaring "Meet Me On The Boulevard" in a notoriously drug infested neighborhood comprised of section 8 housing. The luncheon event was held underneath a tent set up in a laundry mat parking lot. This event was followed by an African American Achievement Awards "ask" event.

MEET YOUR NEW NEIGHBOR...THE PRISONER NEXT DOOR

Prison Fellowship - (serving the incarcerated) hosted a private lunch reception called "Meet You’re New Neighbor...THE PRISONER NEXT DOOR" Luncheons were held state-wide in major urban centers in each city's Courthouse Complex explaining the massive nationwide release of prisoners due to changes in sentencing.

URBAN AMBASSADORS BREAKFAST AT THE UNITED NATIONS

Urban Ministry Training School (training young people for inner city work) hosted the “Urban Ambassadors Breakfast” using the “Delegates Dining” room with a view of the East River in the United Nation’s Building on 1st Ave in New York City. Individuals from NY, NJ, and CT were invited to have breakfast at the UN with dignitaries and celebrities from across the metro region.

AN EVENING AT STORMONT

United Christian Broadcasters hosted an “An Evening at Stormont” on the floor of Northern Ireland’s Parliament in Belfast. Stormont is Northern Ireland’s seat of government where two years earlier a unanimous vote between the protestant and catholic factions of government granted UCB all available FM signals to bring nonprofit radio to that province of the United Kingdom. Robin Mark, world-renowned singer/songwriter, provided the evening’s entertainment pro bono.

LEADERSHIP & FAITH DURING SEISMIC TIMES BUSINESS LUNCHEONS

United Christian Broadcasters hosted multiple lunch and breakfast events targeting corporate executives with awareness events titled “Leadership & Faith During Seismic Times”. Each event featured organizational development expert Antony Bell author of the book “Great Leadership” and were held in spectacular venues such as England’s most celebrated sports stadium Old Trafford home of “Manchester United.”
SUCCESS KEY #3
Invite The Right People...

PLEASE REVIEW THE TUTORIAL

“PROSPECT IDENTIFICATION”

THIS COMPREHENSIVE TUTORIAL WILL ENSURE THAT YOU INVITE A SIGNIFICANT GROUP OF INDIVIDUALS OF WEALTH AND INFLUENCE TO YOUR AWARENESS EVENT.

SUCCESS KEY #4
Invite The Right People...
...In The Right Way

ESTABLISH A HOST COMMITTEE

The purpose of the “Host Committee” is to lend credibility to the non-fundraising awareness event by aligning community leaders with your breakfast or luncheon event. Individuals of gravity, influence, and resource are invited to lend their name to the invitation and attend the event if their schedule allows. In most cases, meeting personally with a host committee prospect to explain the purpose of the awareness event (and the fact that it is a non-fundraising event) will result in a positive response. Finally, if you first secure a highly visible Host Committee Chairperson or Co-Chair (persons well known in the community) the process of “peopling” the rest of the committee will be that much easier. The following list contains suggestions of community leader types that could be invited to join your host committee:

h. Community Foundation Director
i. Philanthropists, Volunteers, and Advocates
j. Prominent Broadcasters from Television & Radio
k. Honorable Mayor, Legislator, Council Person, etc.
l. CEOs of prominent corporations
m. Prominent Clerical Leadership
n. Local Service Organization (rotary, etc.) Chairperson

a. United Way Chairperson
b. CEO of the Hospital System
c. Bank & Financial Institution Presidents
d. School System Superintendent
e. Prominent Nonprofit Leadership
f. Chamber of Commerce President
g. ...and many more

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The following script could be used when inviting an individual to join the host committee:

“Jack...Jan Smith here with 'We Stand For Kids'...”

“John Pendleton asked me to give you a call...is this a good time?”

“Jack, the reason I’m calling is that May is National Mentoring month and “We Stand For Kids” is hosting a non-fundraising awareness event on May 15th to increase the level of visibility of their mission to mentor children of prisoners. In order to ensure a good turnout John Pendleton has established a Host Committee comprised of persons of gravity, influence, and resource known in our community for their leadership. John’s the chair and asked me to give you a call to ask you to join him. The good news is that to serve on the Host Committee simply involves you allowing us to list your name on the invitation and, if your schedule allows, we hope that you’ll join us for the luncheon on May 15th.

Janet Longhorn is Co-Chairing the committee with John and they both thought you would be a great addition to the group. Jack would you lend your name to this event?”

CREATE A COMPELLING INVITATION PACKAGE

If you don’t get the invitation package opened...you’ve already lost your prospects. What can you do to increase the probability that the prospect will open the envelope? Then, what’s inside that will motivate them to attend your event and say to them themselves “I better not miss this.” Here are some key components:

a. Print personalized name and address (handwritten or laser) on envelope
b. Print personalized invitation “tag” on outside of envelope using name of Host Committee Chairperson
   “Ron, John Coble would like to invite you to the Lunch Behind Bars”
c. Use Live Stamp 3rd Class Nonprofit Rate or 1st Class Rate for Postage (no indicia)
d. Print nonprofit’s return address on back flap of envelope (keeps cover face clean)
e. Carrier Envelope size A9 cream paper stock printed one color (black) front and back.
f. Carrier Envelope personalized using variable data for name, address, and tag

g. Invitation Size – 5.5 x 8.5 cream 100 lb. card stock printed one color (black) two sides

h. Invitation personalized using variable data for invitee name (leave space to print name)

i. RSVP Envelope Size – A2 cream paper stock printed one color (black) one side

j. RSVP Card Size – 4.25 x 5.5 cream paper stock printed one color one side

k. Copy for Formal Invitation

1. Name of the Invitee (use married couples combined name when possible)

2. Event Theme

3. Event Date & Time (start time & end time)

4. Event Venue Name

5. Event Address

6. Nonprofit Organization Name

7. Complimentary Luncheon/Breakfast

8. Special Speaker Photograph & Name

9. Host Committee Chair or Co-Chairs & Community Affiliation

10. Host Committee Members & Community Affiliation

11. Creative Relevant Artwork (use the printer’s graphic designer)

l. Back of Invitation card – picture of Committee Chair with invite written in first person

m. RSVP Card w Name & Address Blanks (make sure additional guests can be recorded)

n. Return RSVP envelope...print “Postmaster: Please Rush”

These suggestions consider the least expensive approach to producing an invitation package that works. Please also understand that there are hundreds of different creative approaches to producing an invitation package that works effectively. Regardless, it’s highly recommended that you trust a printer to design graphic artwork and who will take responsibility to print the components and personalize the package. Significant time and money will be saved by allowing one vendor to coordinate this entire process.

**PRE-EVENT CALL CONFIRMATION**

There will be some VIPs that you’ll want to make sure attend your awareness event. Don’t solely rely on the invitation to ensure their participation. Use the following phone script to pre-call a certain number of guest prospects to confirm their RSVP. Do your best to actually speak with the prospect. Don’t leave messages with assistants or reminders on voice mail. Be patient and wait until you’re able to make personal contact. Again, use the name of the Host Committee chair letting the prospect know that “John Pendleton” asked me to give you a call. Make sure you secure permission from the Host Committee Chair to use their name when making calls.
PRE-EVENT CALL SCRIPT

Jack, this is Jan Smith with “We Stand for Kids”…John Pendleton asked me to give you a quick call. How are you today? Jack, you should have recently received an invitation in the mail from John and “We Stand For Kids” to attend our Meet-A-Mentor Reception on December 11th at the Capital City Club. I wanted to personally call and secure your reservation – it really is going to be something that you won’t want to miss. Can I confirm you attendance today?

IF YES: Great – let me verify your contact information:
Name(s) of Those Attending (for nametags)
E-mail Address (future communication)
Best Phone Number

NOT SURE: Let me tell you a little bit more about the gathering. First, I just want to let you know this not a fundraising event. We’re simply inviting a select group of individuals to join us for lunch to better understand “We Stand For Kids” mentoring program. This incredible program has been serving children in Greenville for 60 years, and has had an amazing success rate. In fact, 95% of children who have a mentor graduate from high school, and nearly half of those go on to college. We attribute this success to mentoring and the strength of “We Stand For Kids”.

We would be honored if you could attend the event to hear first-hand of the plans for the future for this gem in our community.

IF NO: Do you mind if take just a minute to share with you what’s happening at the club during this complimentary lunch event?

IF THEY SAY FINE: REVIEW THE “NOT SURE” RESPONSE ABOVE

IF YES: Great – let me verify your contact information:
Names of those attending (for nametags)
E-mail address (important to capture for future campaign information)
Phone number

IF FINAL NO: We will certainly miss you! I regret that you won’t be able to attend, but might we keep you informed on the project?

IF IN THE END YES: Verify contact information, including e-mail and phone

IF IN THE END NO: Thanks for your time today…and goodbye.
SUCCESS KEY #5
Make Sure Your Moment Is Spectacular

Your event program must “take people to the mountain top”. Please don’t waste your attendee’s precious time with just another meeting featuring a bunch of talking heads. Here a few keys that can ensure your success:

a. Transformation…introduce guests to changed lives
b. Ensure your Master of Ceremonies is accomplished
c. Clients must script impact testimonies in advance
d. Demonstrate the effectiveness of your program
e. See to it your actual service deliverables are part of the program
f. Have Board Chair or Director introduce “Case” passionately
g. Have Community Champions share personal inspiration regarding “Case”
h. Have the right person invite the group to action
i. Program should be no longer than 1 hour 15 minutes
j. Have food available starting half-hour in advance to beginning of program
k. Start and end on time

EVENT DAY PROGRAM PARTICIPANTS CHECKLIST

(This is an example. Not all of the following positions need to be filled for all awareness events)

- Set-Up Crew
- Caterers
- Audio Visual Tech
- Parking Attendants
- Door Greeters
- Registration Desk A-L
- Registration Station M-Z
- Testimony
- Master of Ceremonies
- Video Presentation
- Invocation
- Volunteer
- Official Welcome
- Executive Director
- Client Testimony
- Special Speaker
- Donor Testimony
- Call to Action
- Case Advocate
- Benediction
TIMED AWARENESS EVENT PROGRAM SCHEDULE

11:30 am  Doors Open - Walk-in Music – Board Members meet and greet at doors and direct guests to registration table. Upon confirming or registering unanticipated guests, attendees are invited to visit food stations and begin eating.

11:45 am  MC directs guests to enjoy lunch, encouraging them to take in the photos on the easels, and look forward to luncheon event. Board Members, Administration, Development Committee enjoy and cultivate reception guests.

12:10 pm  MC begins program acknowledging special guests and introduces Host Committee chairperson who performs Event Welcome and thanks guests for sharing their lunch hour with us.

12:15 pm  Invocation - performed by respected community clerical leader.

12:20 pm  “We Stand For Kids“ Girls Choir performs “I Need You…You Need Me”

12:30 pm  MC introduces Chairman of the Board who shares purpose and mission…“Why We’re Here Today”. Board Chair then introduces two of the young people entrusted to our care.

12:35pm  “Why This Is My Home” Testimony…“From One Of Our Girls”

12:40pm  “How Everything Has Changed” Testimony…”From One Of Our Boys”

12:45pm  MC introduces the experience and leadership of Executive Director. Executive Director shares agency vision…”We’re Here Because of You”

12:55pm  MC introduces known Community Leader and Key Donor who shares why they’re going to personally provide leadership for the upcoming project (Case for Support) “Community Connections Campaign.”

1:05pm  “We Stand For Kids” Girls Choir performs “We Are Loved”

1:10pm  MC performs “Call to Action” inviting each family represented to meet with a representative in the next few weeks to consider their potential involvement in the “Community Connections Campaign” and invites audience members to complete the contact card at their place setting.

1:15pm  Closing Benediction – performed by respected community clerical leader
COMMUNITY CONNECTIONS PRIVATE RECEPTION
CAPITAL CITY CLUB – APRIL 28th – 12:00pm -1:15pm

Master of Ceremonies
Jack Williamson - WNBC Television

Welcome to Community Connections
Shirley Anton - Host Committee Chair

Invocation
Rev. Janice Wright - First Church of Wilmington

“I Need You...You Need Me”
“We Stand” Girls Choir” - Elise Miller Conducting

“Why We Are Here”
Stanton James - Chairman of the Board

“Why This Is My Home”
With Jamie...One of Our Girls

“How Everything Has Changed”
With Alvin...One of Our Boys

“We’re Here Because of You”
Sally Jane Ellison - Executive Director

Community Connections Campaign
Kerrick Smithson - Community Volunteer

“We Are Loved”
“We Stand” Girls Choir - Elise Miller Conducting

“Call To Action”
Jack Williamson – Master of Ceremonies

Benediction
Bishop Canton Smith – First Church of Hartwell
SUCCESS KEY #6
Make A Promise And Keep It

In hosting a successful awareness event, you just had a big win. You succeeded in hosting a NON-FUNDRAISING event. The point is that you haven’t raised any money yet. Now it’s time to monetize your awareness event by accomplishing two important objectives. First, secure increased involvement from existing supporters who’ve been inspired by your “Case for Support”. Second, build new relationships with the individuals of gravity, wealth, and influence who met you for the first time at the event. The tutorial on “Prospective Cultivation” will go into greater detail as to how to properly cultivate and further earn the right to “ask” but for now there are some immediate tasks associated with the awareness event that begin the cultivation process.

During the event there was a “Call To Action” and you made a promise to “follow-up” to better understand how your guests could become involved in your campaign. Now it’s time to keep that promise. Here are some next steps:

a. Mail handwritten thank you notes to all program participants.

b. Mail personalized thank you letters to all attendees. (“Out-The-Door-In-Twenty-Four”)

c. Respond to any specific requests made by different individuals at event.

d. Will someone please pick up the phone? Set up first cultivation appointments.

YOU CAN DO THIS
Fundraising is simply...
...finding a need and meeting it
...making a promise and keeping it
EXAMPLE POST EVENT THANK YOU LETTER

April 29th

Mr. & Mrs. Barnes
123 American Way
Anywhere, USA 12345

Dear Jack & Jan,

What can we say? Words can’t express the gratitude we want to convey to you. It did our hearts good to see YOU at the “COMMUNITY CONNECTIONS CAMPAIGN” private reception on a very cold Thursday morning. Your involvement was greatly appreciated.

Thank you for giving us the opportunity to share with you the heartbeat of “WE STAND FOR KIDS”. We trust that you felt and heard the passion of Jane Cunningham & Harold Baines as they shared their experiences with us. We also hope that you are able to sense how this organization can make a powerful impact in the lives of public school children and on the major institutions in our community.

We are focused and are about to move forward with in our plans to build the COMMUNITY CONNECTIONS CENTER. Upon completion of this project, we’ll be privileged to serve even more children improving the lives of all our citizens. It’s going to be a special moment...it will be a time for celebration!

Still, we realize that this goal can only be accomplished with support from friends like you. We look forward to giving you the opportunity to look even more closely at the overall program and plans to see if there is a way you can become involved.

Again, thank you for taking the time to join us on April 28th. Thank you for taking the time to read this letter and consider your own personal involvement in this campaign. One of our team members will be in touch with you soon. Until then I remain,

Sincerely Yours,

William Dax
Executive Director

P.S. We’d love to provide you an opportunity to see this program in action first-hand. I’ll give you a call to see if your schedule would allow you to join us on campus for a private tour with our founder Jackson Cannon so you can meet the children personally.
SETTING THE APPOINTMENT - POST EVENT FOLLOW-UP CALL

“Jack, Billy Dax here...just wanted to thank you again for joining us at our COMMUNITY CONNECTIONS PRIVATE RECEPTION. We appreciated the opportunity you gave us to give you a glimpse of what it means to be a part of “We Stand For Kids”.

You may recall we promised to contact you and invite you to take a next step with us to better understand how we may be able to work together.

We’d like for you to have an actual hands-on experience with the children. On May 12th, May 19th, and May 29th we’re having what’s called an EXPERIENCE DAY where you’ll get to meet the children personally. It will last from 10:30 a.m. until 12:30 p.m. on campus at our James River Facility.

Will one of those dates work for you?

IF YES: Great! There are many ways you can participate on EXPERIENCE DAY. All the activities will directly serve the children.

Shirley Anton (our Host Committee Chair) has already agreed to make a lesson presentation to the children. You may ...

___ (1) lead a small group of students in a discussion after the lesson;
___ (2) serve a lunch snack;
___ (4) lead singing;
___ (5) participate in a panel discussion;
___ (6) assist the students with clean up.
___ (7) simply, observe and interact with the students; and/or

If there is some other way you would like to be involved, please let us know. We’ll attempt to make it work.

What role would you be comfortable playing?

Great! Thank you for your willingness to participate. I look forward to having you interact directly with the students to get a better feel for the impact of the program.

I’ll send you a schedule for EXPERIENCE DAY as a follow up to my call. Have a great day.
IF NO: Jack, I still look forward to getting to know you and Jan, and better understanding your goals for our community. Is there a good day to come by your office for coffee or would you allow me to take you to lunch?

IF YES: Let’ set a date...what’s good for you.

IF NO: Well Jack, I still want to thank you for joining us at the Club last week. I look forward to spending time with you in the future. Have a great day.

CONCLUSION – THE RESULTS

You’ve made significant progress moving through the permission-based relationship building process. There have been multiple points of contact (MPOC) such as letters, phone calls, the awareness event, the experience day, as well as opportunities to respond to specific requests made as new friendships have been built. You’ve had a big win and put your best foot forward. Confidence, excellence, stewardship, and faithfulness have been demonstrated in an uncommon way. Now you’re ready to explore specific solicitations which will be expanded on in additional tutorials.

NEXT STEPS...YOU’RE EARNING THE RIGHT TO ASK

With all this hard work already behind you it may be time to approach a prospect and:

a. Invite them to participate in a campaign interview to explore specific involvement
b. Invite them to be a “Table Host” at an upcoming signature “ask” event
c. Invite them to join the campaign cabinet as a visitor and donor to the campaign
d. Invite them to attend a board meeting and consider serving as a member
e. Request a lead gift commitment from an existing supporter who’s been energized by the “case” presentation
f. Request a lead gift commitment from a new friend who has bought into your cause
g. …and much more

PLEASE REVIEW THE TUTORIAL

“PROSPECT CULTIVATION”

THIS TUTORIAL WILL ENSURE THAT YOU PROPERLY EARN THE RIGHT TO ASK THESE NEW FRIENDS FOR THEIR PERSONAL FINANCIAL INVOLVEMENT