Hosting A Mission-Infused Ask Event©
A Different and Powerful Approach!
A Resource of The Osborne Group, Inc.

Gathering a number of current donors, potential donors and leading board members can be a great way to get a group ready for leadership level solicitations quickly and effectively. For those who know you well, this event is a great pre-solicitation step followed by an immediate (within 24-48 hours) solicitation via the phone (for smaller gifts) or in-person (for larger gifts). For those who you don't know as well, this may be a powerful step followed by a discussion with whoever invited the donor. During this debrief, you will decide what additional steps will lead to a joyful yes to for a significant gift. In any case, the event will help you build relationships with those who can help you achieve your vision and growth goals.

Event Preparation

- Identify a great host, someone who believes deeply in your mission, already gives.
- Your expectation is that the host will pay all expenses. Of course, you will recognize his or her expenses as part of the overall gift for the year; credited toward the total given to the affiliate. However, it is also your expectation that this is not the total gift for the year.
- Preferably secure a "top location," someplace people would not otherwise be able to go, or a "special event" location – yacht club, exclusive restaurant, or other interesting location. Someone's home can work well.
- Create your invitation list from current donors, potential new donors and board members. For current donors, let them know it is a stewardship and vision meeting – an opportunity to hear about the new vision for your organization, meet other wonderful donors like themselves, and give you an opportunity to share the impact of their giving. For new potential donors, invite them to hear about a vision that will change your community. Let them know you are eager to HEAR their thoughts.

Event Logistics & Timeline

Note: This timeline represents a cocktail event, running from 6pm until 7:30pm, and assumes that most people attending would be comfortable going to dinner at 8pm. Adjust this timeline to fit your local culture – the time that leaders leave work and dine, etc… As well, the overall flow of this event can be implemented as a dinner, lunch or breakfast event.

6-6:20pm **Guests Arrive & Welcome**

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- This brief “warm-up” is your first opportunity to share strong “think and feel” messages. You want your guests to THINK that your organization is a warm, welcoming place that attracts people like them. You want them to FEEL like part of a great group.
- Guests are greeted by staff and board members. All are invited to sign a welcome book that collects biographical information including email addresses (for new potential donors) and permission to contact all attendees after the event.
- Wait staff circulates with passed drinks, and hors d’oeuvres that are substantial enough to ward off hunger pains.
- Consider having “mission stations” sprinkled around – pictures of the kids in your program, mission staff demonstrating some aspect of your programs, current program volunteers answering questions. These mission stations add to the THINK message, letting guests know in an interactive way that you are a well-organized, productive organization, making a difference.
- Board members and the CEO work through the assembling crowd, welcoming all warmly. They each have been prepared with notes on three to five of the “Critical Few” couples in attendance; they will seek out each of these new or current donors to deliver individual stewardship or cultivation messages tailored by the staff designed to help move the agency’s relationship with these attendees forward in specific ways. For example, *“Thank you for all you are doing. We’re anxious to hear your reaction to our vision.”* You’re sending additional THINK and FEEL messages about appreciation and interest in your guests’ ideas and reactions.

6:20pm **Vision Message Video**

- The guests are invited to direct their attention to a video screen on which a 4-5 minute video is shown. The video delivers both a THINK and FEEL message, making all guests realize the need and the power of your programs.
- Wait staff cease passing drinks and food. A few cocktail tables and chairs have been scattered throughout the “program space” so that some may sit, others may choose to stand. (For larger groups, consider a venue with the possibility of theater-style seating for all.)
- Because the video is an important component of the “case for support” for the evening, it has all the elements of a great case. It is delivering potent THINK and FEEL messages. Make sure it includes:
    - Compelling, easy-to-state, tangible
    - Credibility messages speaking to past accomplishments
    - Articulates the issue to be solved
    - Shares outcomes and the ***societal*** differences your work is making
    - Includes “hearts” and “minds” information – qualitative and quantitative information through first-hand stories
    - Includes third-party endorsements of the power of your effectiveness

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6:30pm **Host Welcome**

- The host stands to welcome everyone in attendance, thanks all the current donors in the room, thus delivering another important THINK message – lots of great people have already invested! The host then introduces the CEO: *"I want to thank all of you for turning out this evening for YOUR ORGANIZATION, and thank all those donors in the room* ***who have joined me in supporting*** *the incredible work you just saw on that moving tribute to our kids. I hope you had a chance to meet members of our staff who are here, board members and current and program alumnae and the girls we serve today. The impact that those individual program leaders have on girls in our community is absolutely transformational. It is my great honor to introduce Angela Miller, the CEO of ORGANIZATION. It may embarrass her to hear me say this, but she is a truly visionary leader about the future of youth in our community and I have invited her to share her thoughts this evening and seek your reaction and insights."*

6:35-6:55 pm **CEO Vision Talk and Discussion**

- The CEO shares her vision for the future in ten succinct, powerful minutes. The power of the vision is not just around FEEL messages but also THINK messages. People invest in leadership. The CEO has a chance to let attendees know that she has a clear and compelling vision backed by a credible strategic plan. People invest small dollars in need and large dollars in hope and opportunity. After delivering the vision, she engages the audience by asking questions, leading discussion on the implications of delivering your programs to all the girls in the community who need it. *"As you think about the needs of our community; our children, families and schools, what impact do you believe we can have if we achieve our vision?"* She waits out the initial silence. People are thinking. Someone will speak. Some will respond to the question, others will have questions. The idea is to engage the participants in a stimulating conversation.

6:55-7:15 pm **Mission in Action**

- The CEO then introduces an youth leader or mission staff member to share their story (an outcome story of success). She then calls on a current participant-program leader pair to share their story (a current need story of hope and possibilities). These are compelling THINK and FEEL messages.

7:15 pm **Host Delivers "Do" Message**

- Host leads the applause. Thanks the CEO and organization representatives for their participation. Reacts to what she just heard.
- Host "testifies," sharing her motivation for and commitment to giving. She again thanks all the donors like herself who have already said "yes" to your organization with leadership gifts.
- Host delivers stewardship message by connecting all they have heard to the generosity of our donors, government, individuals, corporations and foundations.

- Delivers the "Do" Message: *"I hope you've had a chance to meet the board members in the room as well as our incredible staff. One of us will be in touch with each of you in the next few days and weeks – and when we call on you – I hope you'll do what I always do when ORGANIZATION calls and say "yes."*

7:10-7:30pm **Conclusion**

- Participants featured in "Mission-in-Action" and mission stations circulate along with staff and board members throughout the crowd, guided gently by staff to ensure the "Critical Few" are able to meet and talk with the youth and/or staff members, thanking each participant for coming.
- Board members, CEO and other staff complete their outreach with any other "Critical Few" on their list, and make sure that they make contact with any donors to be visited or solicited in-person to seek specific permission to follow-up within the following week. *"It was wonderful seeing you again/meeting you tonight. I'd like to give you a call to find a time when I could ask your feedback on some of the things you saw tonight. Would Tuesday be a good time to call your office?"*
- As they depart, guests collect a small mission-based "take-away" – this could include the full story of one of the youth featured, a CD with a copy of the video shown, a written copy of the CEO's vision discussion, etc… It should extend, not duplicate the story shared during the evening, and **should not be** a "trinket" or token gift.

Event Follow-Up

- Before the event, the staff did preliminary research on all new attendees and divided the entire list of participants into three groups for follow-up. After the event, the staff debriefs with all board members in attendance about what they learned and then meet together with the CEO to make any revisions to the follow-up plans needed, based on the conversations they had during the event.
    - ***Phone follow-up:*** these attendees are called, a few strategic questions are asked about their interests, motivation, and then are asked for a new or increased gift to support the affiliate. These calls should be made to the attendees with the lowest potential to give (less than $2,500.)
    - ***Visit & Ask*****:** these attendees are called and asked to set up an appointment for personal visit. During the visit, strategic questions are asked and a single-year leadership gift is solicited; current donors should be asked for an increased gift. These in-person visits can be helpful for those whose potential to give appears great (but needs to be confirmed) and a longer-term relationship built. These visits should also be made to those whose potential to give is at a leadership but not a major gift level ($2,500 to $25,000).
    - ***Visit & Next Step:*** these attendees are called and asked to set up an appointment for a personal visit. During the visit, strategic questions are asked that are designed to help move the relationship closer to a top

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leadership or major gift. These visits are appropriate for those in the midst of cultivation for a major gift, or long-term commitment to the affiliate (i.e. someone being considered for board membership). The solicitation of these people happens at the right time based on the **overall relationship** with the affiliate, not because of the event alone.

- Staff sends thank you notes to all volunteers involved in planning the event
- Staff sends a “sorry we missed you” note along with a copy of the “take-away” to all ***invitees*** who could not attend and an invitation to take another step with the agency (i.e. invitation to another event, tour, etc…) Information on these invitees should also be retained, and an individual follow-up/solicitation plan developed for all. Individual strategies should be developed for the ***invitees*** with the greatest capacity to give in future.

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