

**Association of Fundraising Professionals
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“The Donor Pipeline—It Starts with the Invitation List: Turning Guests into Donors”

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Best Practices for Event Research

- ✓ It should be a complete review of who is who at each table; their prior gift history, if any; and their potential for upgrade or a new gift in the future.
- ✓ It should also incorporate a bit about their background and interests, both personally and as it relates to the cause.
- ✓ If possible, it should point out common interests to the person assigned to engage the donor.
- ✓ It must include a photo.

Lessons Learned

- ✓ Gift officers are the most effective staff for inviting and following-up on RSVPs: confirming attendance is not just about numbers, it is an opportunity to strengthen prospect relationships and keep your organization top of mind
- ✓ Use an event as a touch point to initiate, renew, or increase giving, or to secure a meeting: prospects or donors who are unable to attend the event, may take the opportunity to make another gift or reinvigorate their interest in your organization
- ✓ Cultivate prospects at the event by making introductions to organization VIPs and development staff
- ✓ Research can illuminate details about inactive prospects that would make an event appealing: different levels of research may reveal geographical, interest, or network information that make an event an effective touch point

- ✓ Always include researchers when events and guest lists are in the planning stage and continue the conversation: your prospects should dictate the events, not the other way around
- ✓ Make sure researchers and gift officers (not just the events staff) are always up-to-date on the RSVP lists

At the event:

- ✓ Ask check-in staff to inform you when important prospects arrive.
- ✓ Seat staff and volunteers near the assigned prospect.
- ✓ Make sure table numbers are clearly visible to staff.
- ✓ Mark your staff or volunteers' assignments on the seating chart.
- ✓ Inform the staff escorting the photographer which attendees are important to you.

If possible:

- ✓ Ask your major gifts team for people in their portfolio that they would like to engage and cultivate by recruiting them to serve on the event committee.
- ✓ Include your major gifts team at all meetings with volunteers about the event.
- ✓ Be prepared to ask the people assigned to you, open-ended questions based on the research so you can learn as much as possible about their family, philanthropy and interests.

Events are a great way to build your major gift pipeline if you use the research to maximize your time before, after and at the event to focus on the right people, and on engaging them in a meaningful way.