Donor Salon Events, Step by Step

A guide to planning and running donor salon events that create meaningful connections between your organization and the people who fund it.

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A salon series is a highly effective fundraising activity for a relatively low level of effort .

Why a Salon Series

A salon series is a set of donor engagement events with a format that invites discussion of an important topic. These can be as simple as a Zoom gathering of 8 to 10 people, or as elaborate as a cocktail hour and dinner hosted by a donor.

Desired outcomes

- Meaningful input on a critical topic, typically an upcoming campaign or a special initiative
- Connection built between leaders and the donor community
- Donors who feel they are in on the ground floor of a shared goal

Event Briefing and Desired Outcomes

For donors

Donors feel like insiders, connected with special initiatives. Their sense of meaning and purpose as a donor grows, leading to increased investment. They feel close to the leadership of the organization.

For your organization

The organization gleans important information from its constituents on a topic of high importance. This helps form compelling messaging and giving opportunities.

A successful salon series takes thoughtful planning and a committed team to create meaningful engagement with your donors.

Planning Timeline, 12 to 16 Weeks Out

Initial questions to consider

- How does this fit with my overall engagement and donor stewardship strategy?
- Does this lead to, or align with, another elevated moment?
- What does success look like?
- What is the right pacing?
- Will there be an ask?
- Who is the right team to lead this, and who will travel?
- Begin checking calendars for leadership and hosts

First moves, 12 to 16 weeks before

- Recruit hosts and block dates on calendars
- Develop branding and messaging for the series
- Set clear, measurable goals for the events
- Hold a launch meeting with the project team

Planning Timeline, 6 to 1 Weeks Out

6 weeks out

- Drop hard-copy invitations
- Major gift officers begin outreach
- Identify VIPs who need leadership-level follow-up
- Schedule the debrief meeting
- Draft pre-work for guests

2 weeks out

- Follow-up calls, emails, and videos
- Begin sending pre-work to confirmed guests

1 week out

- Final follow-up calls, emails, and videos
- Continue sending pre-work to confirmed guests
- Meet with the host and leaders to review the run of show

The discussion brief

In most cases you will give guests resources to prepare for the discussion - an executive summary of the topic, a two-page overview, three or four questions to consider, and any additional materials. Mail it four to five days ahead, and bring extra copies, since some guests will forget theirs or arrive without having reviewed them.

Run of Show

Welcome and introductions, 15 to 20 minutes

- Advancement officer welcomes everyone and introduces the host
- Host thanks all, sets the stage, and introduces leadership
- Leadership introductions
- Guests introduce themselves

Topic discussion over the meal

- Leadership provides an overview of the topic, about 10 minutes
- Facilitated discussion using the prepared reflection questions
- Advancement officer guides the conversation as needed

Wrap-up

- Advancement officer summarizes key points and asks for clarifications
- Promise to share notes after all salon events
- Leadership thanks everyone and the host
- Host offers closing remarks

Consider having an events staff member on hand for logistics. For virtual events, this is your stage manager.

Follow-Up and Celebration

- Send attendees a thank-you that mirrors back the key insights and includes a call to action, such as a one-on-one with leadership
- Each guest is contacted by their relationship manager, if that differs from organizational leadership, to learn what resonated and what didn't, and to set up a leadership meeting
- Contact the people who expressed interest
- Send a thoughtful gift to the hosts as appreciation
- For virtual events, send the recording to those who could not attend and request a follow-up visit

Celebrate a job well done

Acknowledge the hard work of your team and celebrate the completed series. These events build relationships that benefit your organization for years to come.

Key Takeaways

Thoughtful planning

Begin 12 to 16 weeks in advance with clear goals and a timeline.

Meaningful engagement

Create space for connection between donors and leadership.

Valuable discussion

Gather insight on important initiatives while making donors feel like insiders.

Relationship building

Strengthen donor connections through personalized follow-up.

Questions About Donor Salon Events

What is a donor salon?

A donor salon is a gathering organized around a discussion of an initiative or question important to the organization. It gives donors and organizational leaders an opportunity to exchange ideas and develop their relationship.

Can a donor salon be held online?

Yes. A salon can take place online or in person. Choose the format according to the discussion's purpose and the participation you want from guests and organizational leaders.

What should happen after a donor salon?

Thank attendees and reflect what you learned from the discussion. Document the relevant insights, contact guests individually, and agree on appropriate next steps for each relationship.

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