



### What?

This is a “free” one-hour fundraising breakfast. The purpose of the event is to offer an opportunity for potential and current donors to financially support Junior Achievement, and to invite their friends to do the same. Table captains agree to fill tables of 10. The event follows a very simple and somewhat strict model. The program must begin and end on time, introduce the audience to someone impacted by JA programs, and should make a strong emotional appeal. The pledge card will have donation amounts at the \$250-\$5,000 levels with a blank line to fill in a custom amount. Gifts can be spread monthly over a year. There will also be a box to check for guests to request information about volunteering in a classroom.

### Where?

Four Points Sheraton in Bellingham. 714 Lakeway Dr. Bellingham, WA 98229 **FOUR POINTS**  
BY SHERATON

### When?

Networking will go from 7:30-8:00 and the program lasts an hour and ends at 9:00am.

### Why?

Proceeds from the Breakfast ensure that the JA curriculum reach children with programs that bridge the gap of what kids are learning in school and why it will be relevant to them when they graduate. With community volunteers guest teaching JA programs, the kids learn about how their community and economy works in Elementary School all the way into High School where they learn the costs of higher education and living on their own – and how to budget and plan for those real-world costs.

### Goal

The Whatcom, Island, Skagit C area goal is \$50,000. There are also breakfasts in Walla Walla and Yakima.

# EVENT CHECKLIST

## Start Now!

- Identify potential guests (prospects)
  - Make a list of everyone who may have an interest in the work of Junior Achievement: colleagues, clients, friends, family, neighbors, book club members, members at your social/professional groups, Facebook friends, LinkedIn contacts, people whose charitable organizations you've supported, etc.
  - To fill a table of 10 we recommend you initially identify at least 20-25 potential guests
  - Remember: They must also have the capacity to pledge a minimum of \$250 donation.
  - Some table captains like to keep their tables company-only, think about outside or absentee donations for others you think would like to contribute – or try for two tables!

## Pre-Event Stewardship

- Let your prospects know that you will be extending an invitation to an event in the early Spring. Now is the time to introduce the work of JA without asking them to attend -YET!
- Share with your prospects your why. Why do you support JA and it's mission?
- Ask your prospects what they know about JA, have a conversation about JA (without asking for money) and answer questions. If you don't know the answer, say "you know, that is a great question, I'm going to find out for both of us, I don't know either"
- Share a current JA social media post you liked (we're on Facebook, Twitter, LinkedIn and Instagram)
- We'll share with you some of our favorite past YouTube videos that you can share with your prospects
- Share a current article about JA or personal finance (we'll send them to you too!)

## 2 Months Out

- Extend a personal invitation to the event. We find it works best to first send an email, and then a follow up phone call. However, you should use the form of communication that you think will work best for your invitees. Remember: it is typical that you need to invite more people than your table will hold (10 people). Here is a good example:
  - Invite 20 people into a conversation about JA (your pre-event stewardship)
  - Invite those who have expressed interest in JA – say 15 people
  - Secure 9 people for a table of ten that can sit with you at your table
  - Ask those who cannot attend to donate as an absentee
- Submit your guest list early. Even partially completed lists are helpful to ensure efficient reservation processing. As you fill you table you can continue to add guests. Please contact us if one of your guests is not able to attend.

## 1 Month Out

- We will email your guests a confirmation once they are registered (but remember, we must have their email addresses to send it).

# EVENT CHECKLIST

- Ask your confirmed guests if they have any food allergies or special meal requests (vegetarian or gluten free). Please note this on your guest list you send to us. This ask is a great opportunity to re-engage your participants and keep JA and this event top of mind.
- Check back on invitees you haven't heard from. For those who cannot attend, consider sending them information on how to make an absentee donation – that will be counted in your table's totals.

## 1 Week Before

- Guests lists are due! Submit your guest names, email, and mailing address to Hilary Bhagat at [hilaryb@jashington.org](mailto:hilaryb@jashington.org) or (206) 296-2613
- We will send out an email to all guests with arrival and parking information. If you did not provide your guest's email, please forwarding along that information.

## Day of Event

- Arrive to the venue to greet your early networking guests by 7:30am.
- Find your nametag, get some coffee and mingle with guests
- Your table captain packet will be at your table, review instructions on the outside of the packet. Near the end of the event the speaker will tell you when to open your packet and distribute a pledge card to each attendee.
- Once the program begins, sit back – relax – and be inspired!

## Post Event

- **Thank your guests for attending!** A quick email or text later that day will be greatly appreciated!
- On your table will be a second packet for you to take home with thank you cards. We'll contact you within the next few days to let you know who at your table donated and at what amount. It would be fantastic if you'd pop a quick thank you card in the mail to them thanking them for attending and for their donation.
- Look back at your initial list of 20 people. Think about contacting those who couldn't attend via email or phone call and let them know what you enjoyed or learned at the event. Ask them if they'd be interested in making a gift.
- What about others who might enjoy hearing about something new you learned at the event. Fundraising and spreading the word about JA doesn't need to stop a here!



# COMMON QUESTIONS

## What is my job as a table captain?

We count on our table captains to be JA ambassadors and share our organization with their guests. We expect that you will invite guests to join your table at the breakfast and help pass along information and logistics to your guests.

## How much does it cost to attend the breakfast?

There is no cost or ticket price to attend, however guests are encouraged to donate a minimum of \$250 to support our programs. We recognize that might not be feasible for some guests, but we're also hopeful that some guests will add zeros to their gift!

## Am I on the hook for a fundraising total for my table?

Absolutely not. While the suggested donation is \$250, JA does not hold table captains to a fundraising minimum. There is no ticket price or cost to attend. To avoid misunderstandings, we suggest that table captains are up-front with their guests about the suggested donation and at what level they would like their guests to give.

## Can I purchase a full table?

We would certainly welcome table captains interested in covering the minimum donation for their full table (\$2,500). But again, this fundraising model is based on table captains recruiting guests – and making JA do the “work” to inspire the audience to contribute.

Table sponsorships are available and explained later in the booklet. But the assumption is that your guests will still be moved to contribute, not told that their donation has already been made on their behalf.

## How do my guests donate?

Guests can make gifts in a variety of ways. At the breakfast, we will have pledge cards on the table. Guests can fill them out and note the amount that they're giving. Gifts can be made via credit card,

check, cash, or pledges. Please remind your guests that credit cards and pledges can be paid monthly or quarterly for up to a year in order to accommodate a larger yearly gift. If guests would like to become a sustaining donor indefinitely there is also a checkbox for that.

As the table captain, your job is pass out and collect these pledge cards. JA staff members will immediately collect the envelopes for counting and processing.

## How do matching gifts work?

Some companies support their employee's philanthropic donations and offer a matching gift. This is a gift from their own company that matches the gift of their employee up to a certain amount/percentage (typically). JA definitely wants to know if a guest is planning on requesting a match from their employer. You and your guests can help us by bringing matching forms from your employer to the event (if that is possible). The employee must make the request from their employer, JA cannot make that request. Your guests' matching gifts will count toward your overall table total. Sometimes it can take months for those monies to come in but if your guest has their form with them at the event, we will count it in your totals for that day.

## How do I register my guests?

Our goal is to make guest registration as smooth as possible for you. You can register you guests in a variety of ways. The more information you can provide about your guests, the better. JA especially would like to have your guest's email addresses, mailing addresses, phone numbers, and their company or relation to you (all optional).

Email [hilaryb@jashington.org](mailto:hilaryb@jashington.org)

Mail: Junior Achievement of WA

Attn: Hilary Bhagat

1700 Westlake Ave. N. Suite 400

Seattle, WA 98109

Call: Hilary Bhagat at (206) 296-2613

# COMMON QUESTIONS

## Why do you need so much information about my guests?

EMAIL: JA will communicate with your guests in a few different ways. Within one week of you registering a guest, JA will send them a confirmation email as well as a follow-up email one week prior to the event with arrival and parking information.

MAILING ADDRESS: JA works very hard to send thank you cards to breakfast donors within the first 48 hours of an event. To make this process run seamlessly, we pre-print labels with your guest's addresses. We encourage table captains to also send thank you cards to all the attendees at their table. We provide you with the same mailing address labels to use for your thank you cards. - After all, we couldn't run the incredible JA programs in your area without their and your support!

## What if I have last minute changes, cancellations or additions?

Please let JA know of any changes as soon as possible. **Up until the Friday before** please contact Hilary Bhagat at (206) 296-2613.

If you have any **day before changes**, call Hilary at (206) 200-4613.

If you have any **day-of changes** please let our registration desk know when you arrive and inform your guest to be prepared to know who their table captain is and who they are replacing (if applicable).

Even if a guest cannot make it, **they can still make a gift** to help our community's youth. As you leave there will be extra pledge cards at the registration table. Please consider sending them out, be sure to write your name in the table captain line! Guests who cannot attend can also donate online. Instruct them to go to [jawashington.org](http://jawashington.org) and click donate or have them call Hilary Bhagat at (206) 296-2613.

## What if I have a guest with dietary restrictions?

Let JA know as soon as possible if you have any guests who need special meals. Typically, or caterers

are able to accommodate most dietary restrictions, including: vegetarian, vegan and gluten-free meals.

## What if I have more than 9 guests?

That's great! JA will work with you to seat your additional guests at an adjacent table. If you have enough to fill a second (or third, or fourth) table, JA will ensure they are placed near each other. In this situation, some table captains like to nominate one of their guests to serve as the informal table "host" at their additional table(s) to help ensure that everyone gets a warm welcome and that all donations are collected.

## What if I have fewer than 9 guests?

That is nothing to worry about! JA will fill any extra seats with individual guests or overflow guests from another table captain. In the case that you have individual guests at your table – JA would truly appreciate in making them feel welcome!

## How can I get more involved with this event?

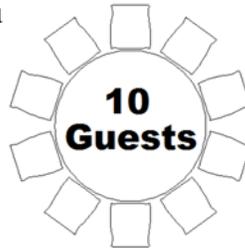
We rely on volunteers to set up our registration table and décor on the morning of the breakfast.

Volunteering is a great way to become more involved with the mission of JA and see some behind-the-scenes action of our events! To learn more about volunteering for the breakfast please contact Hilary Bhagat at (206) 296-2613 or email [hilaryb@jawashington.org](mailto:hilaryb@jawashington.org).

## I think my company should be a sponsor, how do I get them involved?

Sponsors are absolutely essential to the success of our events. Because they underwrite all of our expenses, 100% of your guest's donations go directly to support local JA programs and services.

To learn more about sponsorship, contact Hilary Bhagat, Senior Manager of Development at (206) 296-2613 and review the sponsorship levels on the back page of booklet.



# TIPS FOR INVITING GUESTS

- **Take some time to learn about Junior Achievement (JA)** to help you in sharing our mission. Your Table Captain packet contains some useful information for you to use to spread the word about our important work. You are welcome at any time to give us a call with any questions. And [www.jawashington.org](http://www.jawashington.org) is also a great resource.
- **Let people know your personal connection to JA.** Your story often means as much to your friends and colleagues as it means to you. If you don't have a story, we will share success stories with you.
- **Add a sentence about the event to your email auto signature** (if allowed) as a way to educate and remind the people you are often in contact with.
- **Be up front with everyone about the event being a fundraiser.** There is no up-front cost to attend the Breakfast, but we will ask for a meaningful contribution at the event. No pledge is too little, though a \$250 is a suggested minimum.
- **Write personal notes** on the invitations that you mail or hand-deliver to your invitees. This is a great way to connect your name with the organization's materials. People are usually much more responsive to a person than they are to an organization.
- **Communicate with your guests** with the templated emails or phone calls on the next page. We recommend tweaking them to fit your personality.
  - Recent social media posts, articles, etc. (we'll provide you with these)
  - Invite your guests – printed and digital invitations available
  - Follow up for an RSVP after invitations have been mailed/emailed
  - Reminder the day before the event with parking and check-in information
- **Be a squeaky wheel!** It's very important to follow up with people you don't hear back from. Just because they don't follow up with you doesn't mean they aren't interested in joining you. People get busy and forget to RSVP even though they have every intention of attending the event.
- **If your invitees are not able to attend,** consider asking them to make a tax-deductible gift or a monthly pledge to JA. It is also a nice way for your friends to honor and recognize your commitment to Junior Achievement.
- **Questions?** Feel free to call JA staff and ask questions – we are happy to help you!

Contact **Elaine Christensen** with questions regarding volunteering and the programs held in Whatcom, Island, and Skagit counties.

[elainec@jawashington.org](mailto:elainec@jawashington.org) – (360) 715-1132

Contact **Hilary Bhagat** with any questions regarding sponsorships, fundraising and this event.

Hilary Bhagat – [hilaryb@jawashington.org](mailto:hilaryb@jawashington.org) – (206) 296-2613



# SAMPLE WORDING FOR INVITING GUESTS

## Sample E-mail or Letter Invitation

Dear NAME,

(insert short how are you – personal to your relationship)

(Introduce your passion to JA – this will vary if they do or don't know your connection to JA.)

I am serving as a table captain for Junior Achievement's (JA) annual breakfast, and I would love for you to join me at my table. JA is a nonprofit that reaches children in our area with financial literacy and entrepreneurship programs that bridge the gap of what kids are learning in school and why it will be relevant to them when they graduate. Kids learn about how their community and economy work in Elementary School all the way into High School where they learn the costs of higher education and living on their own – and how to budget and plan for those real-world costs. (Share your personal connection to JA and reasons for supporting)

The breakfast will be held at the Four Points Sheraton in Bellingham just off I-5 on Tuesday, March 13. It lasts an hour and starts at 8am. I'll be there a half hour early for the networking session.

It will be a great opportunity to learn more about the work that Junior Achievement is doing to empower our youth to reach for their dreams.

While there is no cost to attend, the breakfast is a fundraiser – it helps support all their programs and services. Each guest is suggested to consider a donation of at least \$250, (if applicable you can continue with:) but I'm asking my guests to consider a gift of \$\_\_\_ as a benchmark of their generosity.

I would love it if you were able to join my table!  
(sign off and your name)

(attach digital invitation)

## Talking Points for a Phone Ask

Hello, \_\_\_\_\_, this is \_\_\_\_\_

(insert short how are you, is it a good time to chat line – personal to your relationship)

The reason I'm calling is to let you know that I'm hosting a table this year at Junior Achievement's breakfast on Tuesday, March 13th.

Are you familiar with Junior Achievement (if applicable)?

The mission of Junior Achievement, JA for short, is to inspire and prepare young people to succeed in a global economy.

Junior Achievement of Washington is an independent regional organization, know that every dollar you donate will go directly to helping our youth in Whatcom county.

Each guest is suggested to consider a donation of at least \$250, (if applicable you can continue with:) but I'm asking my guests to consider a gift of \$\_\_\_ as a benchmark of their generosity.

I recognize that we're in a new economic day and age, so there are several options for making this gift. A pledge can be paid by check, cash or card and installment options are also available to break up a larger gift amount into monthly or quarterly payments.

I would love it if you were able to join my table! Are you comfortable with the suggested pledge amount?

The event is on a Tuesday and lasts an hour ending at 9am. It's at the Four Points Sheraton in Bellingham right off I-5 and there is a networking session a half hour early at 7:30am that I'll be attending, I hope you'll join me!

(Unable to attend) I'm sorry you're not able to come, would you consider making a tax-deductible gift or a monthly pledge to JA? (This is a nice way for your friends to honor and recognize your commitment to JA if you plan on hosting a company-only table).

# SPONSORSHIP OPPORTUNITIES

|   |                       |  |
|---|-----------------------|--|
| <p><b>Presenting Sponsor</b><br/>(1 available)</p> <p><b>SOLD</b></p> | <p><b>\$5,000</b></p> | <ul style="list-style-type: none"> <li>• A representative addresses the audience at breakfast</li> <li>• Two tables for 10</li> <li>• Sponsor's logo will be prominently featured throughout all Ignite the Spark promotional materials, invitations, and event materials</li> <li>• Sponsor's company-provided banner will be displayed at event</li> <li>• Sponsor's logo will be featured on their table at event</li> <li>• Sponsor may place company-provided promotional items at each guest's seat (i.e. pens, notepads, etc.)</li> <li>• Recognition on JA's website with link to sponsor's website</li> </ul> |
| <p><b>Titan Sponsor</b></p>   | <p><b>\$2,000</b></p> | <ul style="list-style-type: none"> <li>• Sponsor's logo will be prominently featured throughout all Ignite the Spark promotional materials, invitations, and event materials</li> <li>• Sponsor's logo will be featured on their table at event</li> <li>• Table for 10</li> <li>• Recognition on JA's website with link to sponsor's website</li> </ul>   |
| <p><b>Table Sponsor</b></p>   | <p><b>\$500</b></p>   | <ul style="list-style-type: none"> <li>• Sponsor's logo will be featured on the event program</li> <li>• Sponsor's logo will be featured on presentation slide at event</li> <li>• Sponsor's logo will be featured on hosted table for 10 guests</li> </ul>  |

If you have further questions, need additional materials, or would like to discuss a customized sponsorship plan suited to your business's budget and marketing wishes, please contact:

Hilary Bhagat at (206) 296-2613 or [hilaryb@jashington.org](mailto:hilaryb@jashington.org)

**Ignite the Spark**

**Four Points Sheraton - Bellingham**  
**Tuesday, March 13, 2018**

Networking: 7:30-8:00 AM  
Program: 8:00-9:00 AM

funds raised "ignite the spark" in our  
Whatcom County youth to reach for their dreams

Funds benefit: Junior Achievement of Washington

Sponsored by: BANNER BANK