Beyond Selling Tables: Moving Your Board To a Year-Round Fundraising Model

The dreaded gala. A good board works diligently to fill the tables, reaches its goal, celebrates long into the evening, then drops in exhaustion the day after. Stir and repeat, a year hence.

Judy Levine, Executive Director, Cause Effective

But a great board brings donors through the door and builds their loyalty, all year long. So how do we go from good to great? And why does this transition matter? As long as board members are raising funds, no matter the medium, aren't they doing their job?

Well…

Great fundraising boards don't rely exclusively on galas. They know that fundraising events are an ineffective way to raise funds. The cost is high (possibly as much as 50 cents for every dollar raised). Often table and ticket buyers are drawn in by the asker ("I'm coming to please Paul") or the social aspect of the event itself ("It's a good place to meet people for my business"). But they don't make a lasting connection to the mission. How many times have you heard someone say "I went to a great event last night – I think the organization had something to do with children…"?

Great boards organize to raise major gifts, the most significant revenue producer in individual giving. And a key part of major gifts is systematically upgrading "starter" donations, along with expanding the circle of people who are asking. But we're less likely to be successful at either of these strategies if donors haven't made the connection between their giving and the people who are being helped. People give more as they see the results of their gift. The fact is that event contributions, in themselves, do not offer sufficient "return on engagement" to help upgrade someone's giving level or turn them into an asker.

While serving on an event committee can be effective in engaging a donor, this approach still ties cultivation to a single ask and to the timetable of the event. More personalized approaches to individual donor prospects allow you to act sooner and ask more often in ways which are tailored to the interest of the donor. Indeed, there are large donors who would rather see all their money spent on program than attend a dinner.

But event-asking looms large in board members' fundraising toolbox, partly because selling a ticket or table seems easier for board members than a straight-out request to support a cause. Board members feel like they're offering value – even if the item received is something no-one really wants (a chicken dinner at a swanky hotel).

How do we broaden board members' willingness – and courage – to step beyond the event circle to engage prospective donors throughout the year?

Here are some tips for getting started:

• Help board members articulate the case. One reason board members hew so closely to event-based asks is because it feels like they're offering something tangible – a table with 10 tickets in exchange for $10,000. Help them ask in terms of your mission, by describing, say, the additional children who could be served with mentors to help break the cycle of poverty. Your board members need training in listening, too, to discern what aspect of your mission will be of most interest to a particular prospect. Selling the organization beyond selling an event takes practice, and requires that board members know your programs, tie gifts to meeting compelling needs, and can describe, in an inspiring way, where the organization is headed and what it needs to get there.

• Convert an event-focused board Fundraising Committee into a year-round Development Committee. Often a board fundraising committee, in event-centric boards, is really an event committee. Have a conversation with the committee chair (at a time

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when you're outside the event-pressure bubble) about broadening the scope of the committee to oversee the entire private fundraising outreach of the board. Think about adding a co-chair, and/or new members, so the committee can accomplish more without simply redirecting its limited time away from the benefit. Consider adding non-board members to this committee.

• Develop a plan for board fundraising that's a roadmap with actions spread throughout the year. Focus this plan on the board activity integral to helping the agency meets its development goals, so it's easy for the board to see its part in ensuring that

the agency meets its projected budget. Have the newly-enlarged De velopment Committee spearhead drafting and presenting this plan to the full board.

• Establish a regular schedule of touchpoints throughout the year through which board members can engage their friends and colleagues in the agency's mission without asking for money. Work backwards from an ask such as an annual appeal (or the event) to create a timeline for donor cultivation, so that board members can visualize the whole sequence as they participate in specific activities.

• Ask board members to serve as non-event "hosts," inviting buddies to friendraising opportunities like a program celebration, press conference, or even lunch with the director. No asking involved – just a special look behind the curtain at what makes the agency tick.

• Give board members no-stress assignments in fundraising like thanking donors through calls and notes for their largesse. This allows them to inch their way into non-eventbased fundraising so they'll come back for more complex assignments after enjoying success.

• Consider brainstorming a program-related "wish list" to enable board members to ask for concrete items. Scholarship funds, backto- school gifts for young clients or field trip subsidies are always great asks, because they personalize your service and give board members a hook to describe your impact.

• Give board members concrete "friendraising" assignments at your event. Assign the task of learning about important guests to specific board members during the event and set up an event debrief session for soon afterwards so board members know they'll be held accountable for sharing their knowledge.

• At the debrief, ask board members to build upon what they have learned in designing follow-up activities to deepen the agency's relationship with these individuals. As a side benefit, this rein-

forces the idea that giving follows interest and connection, and is not a random act based on the fact that the donor "has money."

• Create and celebrate non-event-related fundraising milestones – 10 donor prospects attending the Summer Volunteer-A-Thon, the most notes on annual appeal letters, a major gift pledge. While nothing can replicate the adrenaline rush of a successful event, try to drum up some excitement for the "little things" that add up to the big picture of a month-in, month-out integrated friendraising/ fundraising effort.

• Ask colleagues – and consultants – for help. A prophet is without honor in his own country… and boards are notorious for ignoring internal voices that push for change. Consider having a representative from another board that has crossed this Rubicon come speak to your board (better yet, get a board member to invite them). A consultant who has taken boards through this change can also speak to what has worked among similar groups in transforming the board's fundraising comfort zone.

Moving beyond events is the next frontier in board fundraising – and can be as much of a culture shock as the initial push for board participation in event-based fundraising was in the first place. But it can be done, and the more you can point to small instances of success the more your board will become emboldened year-round friendraisers. The result, in this day-and-age of shrinking institutional dollars, is worth the effort.

Judy Levine is executive director of Cause Effective, a nonprofit that, for over 30 years, has helped thousands of nonprofits to find new donors, unleash new forms of support from old friends, and inspire boards of directors to be effective and confident fundraisers.

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