



BOARD BRIEF: Strategies for the Ask

Board Briefs are "at-a-glance" resources that help board volunteers better support their Boys & Girls Club. They are designed to occur as five-minute education opportunities at board meetings.

SUMMARY

Most Boys & Girls Clubs raise some money from special events and individual donors. For large sums of money though, the most effective tactic is a targeted fundraising *campaign*. There are several types: *annual giving*, *capital*, *endowment* and *comprehensive*. Strategies for these campaign types differ, but the components are similar.

Success in raising *annual* operating funds requires a well-planned, well-organized, and well-led effort. It must be coordinated with other local fundraising efforts such as the *United Way* campaign. Among other things, all board members must be involved, a respected leader must serve as chairperson, and many volunteers must be willing to make personal calls on prospects.

DEVELOPMENTAL STEPS FOR CAMPAIGNS

1. Determine your Club's *goals* through strategic planning.
2. Determine fundraising goals (how much *money*) and develop strategies to achieve them.
3. Identify and evaluate *prospects* (current, lapsed, and potential).
4. Build *relationships* with prospects (educate, cultivate, and involve).
5. Prepare *case* statement (justification for support) explaining why donors want to support the Club and other *marketing tools* (campaign brochure, fact sheet, etc.).
6. Organize *human* resources (committee, board, *campaign chair*, volunteer solicitors, staff).
7. Lay out a *timetable* with target dates for activities and meetings.
8. *Solicit* prospects (board members and volunteers solicit; general chair solicits peers).
9. *Acknowledgment* of contributions and time (thanks; recognition for donors and volunteers).
10. *Evaluate* and start planning for next campaign.
11. Develop *comprehensive stewardship* plan for all donors.
12. *Celebrate!*

DIFFERENCES

Annual Campaign

This type of campaign provides income for unrestricted and restricted *ongoing* programs and services. It also identifies and cultivates new donors, cultivates current donors to increase giving

levels, identifies leadership, and identifies major gift prospects. These gifts are smaller than those typically requested in a capital drive, and are requested annually.

Capital Campaign

For gifts *larger* than typical annual campaigns, a capital campaign is conducted – sometimes over a multi-year period. They are an intensive and organized effort that uses many volunteers to raise money for *special needs* (e.g., construction, expansion or renovation of facilities; acquisition of special expensive equipment; building an endowment or scholarship fund, etc.). This type of campaign is preceded by a feasibility study, planning and identification of major gifts and leadership.

ROLE OF SPECIAL EVENTS IN CAMPAIGNS

Special events such as banquets, kick-off meetings, celebrations or even fundraising benefits are often part of campaigns. Many Clubs use special events to **raise operating income** as part of the annual campaign. Events are financially successful once they have been conducted and improved over a period of *several years*, becoming institutionalized. Special events are **not always** designed to raise money; they may be designed to cultivate interest, provide recognition or celebrate victories.

WHY CAMPAIGNS CAN BE EFFECTIVE

- Requires the Club to become organized and focused ("get house in order");
- Builds consensus around the Club's mission and case that both board and staff sanction;
- Enlists and involves new leadership and volunteers; mobilizes existing ones;
- Allows gifts to be leveraged, such as when donors see the value of their gift relative to stated needs (demonstrated in a case statement or on a "scale of gifts");
- Permits donors to "designate" their gift in several different ways;
- Makes it easier for your board and volunteers to make a personal gift before asking others;
- Provides an overall goal and the important role every gift plays in achieving it;
- Allows staff and board to focus energy for a specific time rather than all year long;
- Can be timed to coincide with a major event that allows a celebration (e.g. annual meeting).