

Gathering Friends with Small Socials

In addition to private one-on-one Advice Visits, your board members can help organize and host group meetings to spread the word about your cause. Socials and group events do not involve the prospective friends and donors as directly as Advice Visits, but they do offer the chance to connect with larger numbers of interested potential supporters. You can expand your community relationships and make friends faster—although not as in depth—through group socials.

A Small Social can take several formats. It can be a coffee, a tea, dinner, or cocktails. It can be breakfast meetings or luncheons with several people. It can include from three or four people to over one hundred.

The Small Social can take place just about anywhere: in a restaurant, a coffee shop, a board member's office or home, on a front porch, or at your organization's offices. The point of the Small Social is that it is a group event and requires a special format in order to be successful.

There Are Four Rules to a Successful Small Social

It's easy to get intimidated if you are asking someone for help. But inviting somebody to be part of something that you are proud of is easier. —Diane Paces-Wiles, Former Board Member

The first rule is that a board member or volunteer should do the inviting and hosting. That person is reaching into his or her social capital networks to bring new friends into the organization.

The second rule is that these events are free for those invited. Someone else is picking up the tab. The host or group of hosts should chip in to cover the expenses of the event and/or get what they need donated.

A third rule is that this is a *cultivation* event designed to introduce people to your organization or, if they already know you, to fire them up and involve them in your mission. Your goal is to bring them closer to your group and its work.

Should you ask for financial support at a small social, especially if your main goal is to raise friends, not necessarily money? A soft appeal for financial support is okay, but it is *not* the focus of the event—and the request can throw the event's entire tone off kilter if it is not done carefully. I prefer to take the slow road and keep the solicitation out of the picture, if you are trying to develop long-term relationships with people who can be potential major donors.

I remind eager board members who want to solicit, that it's just like trying to move too quickly on the first date. You don't want to go too fast when you are courting someone. Taking things

more slowly works out better long term. To rush right into soliciting makes people feel like all you want out of them is their money, and they are right!

Experienced fundraisers know that fundraising success today depends on what you did 6 to 12 months ago. There is a long lead time that cannot be ignored. And the faster you ask for money, the less you will raise. If you feel it is appropriate to ask for financial help at a Small Social, be sure you are passionate about addressing the need. Be sure the conversation is about correcting social ills in your community, not about money.

The last rule for small socials is that you must plan your follow-up before the event. What will you do to continue to connect these new friends to your organization? Please do not even think about having an event like this unless you know exactly how you will follow it up and are sure that you have the staff or board members ready to make follow-up calls.

I have heard too many sad tales of brilliant cultivation events staged by worthy causes, full of powerful and influential people who could help the organizations fly high; regrettably, no follow-up ever occurred. Board and staff members may go all out to get the right folks to their big social event. Then when it is over, they find themselves too exhausted or unorganized to tackle the hard work of the next step—face to face conversations or Advice Visits with the VIPs who attended.

Terry Axelrod, in *Raise More Money*, calls this type of Small Social gathering a Free Feel-Good Event (but only if it does *not* include a solicitation). Although I will not use this “feel-good” term in front of my guests, I will use it with my board members so they can understand exactly what we are after.

Another matter of word choice: I don’t like to call these socials “events.” What would you rather attend: a porch party at someone’s home, or an event? Even calling it a “wine and cheese reception,” stale and overused as that phrase is, sounds more interesting than the word “event.”

Be careful with your wording: what you say helps to “brand” your events as fun or not. And do remember that most people would rather spend their free time doing something enjoyable, rather than something that sounds a bit too earnest and hard-hitting. I would prefer to attend a “social,” than an “event.” How about you?

The goal of throwing the party is to be interesting and provocative about your cause, while at the same time helping people to enjoy themselves. We all take fundraising too seriously sometimes, but our prospects do not. If you can manage to make your events enjoyable and fun, I promise you will have more people on your bandwagon! And you will raise more money!

What Type of Small Social Gathering?

If you want to approach a society crowd, you might best consider drinks or cocktails at someone’s home. If you are connecting with corporate leaders, then coffees or lunches would be more appropriate. Being a Southerner, I understand that many Southern social networks are based on two things: story telling and having a little drink. I often invite friends over to have a glass of wine on my front porch and hear about my latest project, favorite community issue, or

political cause. When I combine what Southerners like the most—the drink and the story (not to mention the porch)—we can have a good time and still get serious about how to make a real difference to our community.

A Small-Social Example

When I served on the board of Raleigh’s now world-class Carolina Ballet, we hired an outstanding new artistic director, Robert Weiss. As a board member, I hosted a casual cocktail “porch party” to introduce him to some of the movers and shakers in Raleigh. My guests were pleased to come; they wanted the chance to meet someone the whole community was talking about, before many others in the community had met him. People like to be in the know, and my friends enjoyed being among the first to meet a major new artistic leader in town.

From the Ballet’s perspective, the Small Social porch party gave us an opportunity to build relationships with a key group of important potential supporters. Some of the people who came to that porch party eventually became board members and donors to the Ballet. However, money was not what I was after that afternoon. I wanted to open doors, by making introductions and creating new friends.

My role as a board member in hosting the event was merely to identify important people I wanted to involve with the Ballet and introduce them to the Artistic Director. His smart staff did the rest. I was not involved in soliciting, only in organizing a little gathering. My role was to do some friend raising and get more folks interested in and excited about the Ballet.

About 30 people attended, and 30 more could not come but looked forward to meeting Robert Weiss another time. We added everyone there to our bandwagon that evening and identified just as many more people who would be getting involved in the future.

Remember, just the act of inviting people helps put your organization on their personal radar screen. Even if they do not attend the party, they did receive the invitation, which is clearly a bit of personal marketing for your organization. When you are sending out personal invitations to socials, it helps to remember that the invitation alone is an important tool to connect new people to your organization.

Don’t think that the energy you put into the invitation and the list is wasted because fewer people actually attended than you expected. Everyone who received the invitation got a bit of snazzy marketing in their mailbox promoting your organization on their personal radar screen.

How to Stage a Small Social

The program for a Small Social involves three steps: the Volunteer’s Welcome, the CEO’s Message, and the Follow-Up. This entire sequence should only last about 15 minutes, especially if people are standing up while they listen. Any longer and you will lose people as they drift away to the corners or into another room.

Staging a Small Social Step One: The Volunteer’s Welcome

Here is a chance for your volunteer host to speak from her heart and tell her friends why she is involved with your organization. The Volunteer's Welcome is very powerful. It should be easy for the volunteer/host to give this speech because he or she does not have to do a presentation about the organization; instead, the volunteer gets to tell his or her personal story. We all, as smart fundraisers, know the personal story is more powerful than any facts, figures, or formal presentation about the organization.

The volunteer's story is more important than the staff's, because a volunteer is involved only out of the goodness of his heart, only because he cares. As we discussed earlier, volunteers come from the high moral ground of caring about their community and are "cleaner" than the staff. When I am attending such an event, I am frankly more interested in why a volunteer thinks this project is important and meaningful to the community than I am in hearing from the staff. The volunteer's story is usually more compelling and interesting to listen to and tends to grab me emotionally.

Staging a Small Social Step Two: The CEO's Message

Here is the chance for your CEO to shine. Your CEO is your organization's leader and gets to show up as visionary and inspirational. His talk needs to be short and sweet, ten minutes max. It needs to be big picture or nothing at all.

Too often, the CEO's presentation is too dry and factual. I can understand this because the staff deals head-on every day with the powerful emotional experience of their real work in the community. I find that because of the constant emotional demands on them, CEOs typically need to distance themselves a bit from their heartstrings. As a result, sometimes their presentations come across a bit more businesslike and less from the heart than those of the volunteers.

Staff leaders may be passionate people, yet when speaking about their organization, they can shift into a more professional, clinical tone that emphasizes programs instead of the results their organization achieves through its good work in the community. The CEO has the limelight for a few minutes to deliver a high-impact message about your organization that conveys passion and urgency.

Think Martin Luther King's "I have a dream" speech. Think of any of the most rousing speeches you ever heard; that is the spirit needed in the CEO's message. "It is well worth taking the time to craft it well," says Terry Axelrod, "and to coach the (CEO) to deliver the talk powerfully. . . . It needs to clearly convey 'the gap' between where your organization is now and where you need to go to fulfill the next phase of your mission."

Here are key points about the CEO's Message:

- ***Tell them about the IMPACT the organization is having on the community.*** How are people benefiting from your work? Show the difference your organization is making in the city, in the region, and in the world.

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- **Use stories.** Paint a picture of your nonprofit with stories that can graphically and emotionally illustrate the need your organization addresses. Stories are easier for people to remember than facts.
 - **Use emotion.** Be willing to wear your heart on your sleeve. Above all, be passionate! Explain the urgency of the situation. Be willing to use colorful language. Remember that people give money out of emotion.
 - **Talk about the need.** This is why your organization exists: to help fill an urgent community need. Tell about the people who are suffering, until you can see your audience react with emotion. The bad situation you describe is why you so much want their help. You can feel confident that, once you have gotten the need across to them, your audience and your community is going to want to help you. And they will.
 - **Build credibility.** These days Americans have less trust in nonprofit institutions than they once did. A 2006 poll by the United Way found that only 51% of Americans trust nonprofits to do what they say they are doing to do with donations they receive. The Brookings Institution found that only 11% of Americans believe that nonprofits do a very good job of spending money wisely. If your organization has been around for a decade or more with an unblemished track record of service to the community, then you have enormous credibility. People will feel you have earned their trust.
 - **Share your dream for the future.** Where is your organization going? Where do you see yourself heading? What are the needs you are not able to fill? What are your dreams? Don't use jargon like "unmet needs"; that kind of language is too far removed from the urgency of what is happening out there on the street. Approach the talk as if you are certain your audience is going to be as concerned as you are and as interested in a better future. You know they want to see their community whole and healthy. Expect that they are already sold and just need a bit of cheerleading. Tell them how they can help.
 - **Present a clear request for assistance.** The call to action is the most important part of your talk. You will need to tell them exactly how they can help. Why are they there? What specifically do you want them to do? Get them to take some action to support you.

Wanting to take action to help each other is a fundamental part of being human. In fact, even Charles Darwin (the author of a major theory based on scarcity, not abundance) concluded that human beings are biologically inclined to help each other. So call your audience to action: "We need friends out there in the community to help spread the word about this situation. This problem is not going to be solved with our current group of supporters, board members, and volunteers alone. It is too important to be left to just us. We need the whole community up in arms to help out!"

Then offer a short list of how your organization needs help, and be as specific as possible. Do not suggest more than three things they can do. You might say, "We need you to do three things: First, write a letter to the editor of the newspaper. Second, come volunteer this month. Third, host a small social like this one to help us reach more people. Our goal is to have a small social event every month this year. Please help us reach this goal. We need hosts for July and

September; can you be a host?" In a context like this one, you could also seamlessly add the optional request for a contribution, as just one more example of your need for help.

Sample Requests for Help at a Small Social

- Spread the word! Tell others about this work, and help us get our mission on the community's radar screen.
- Come volunteer and make a difference.
- Bring your friends in for a tour.
- Introduce us to a local philanthropist, government official or corporate leader who would want to know about this problem and who can help.
- Host a Small Social of your friends to hear about our organization and bring more folks onto our bandwagon.

Staging a Small Social Step Three: Follow-Up, the Most Important Action of All

Why have an event at all if there is no plan or staff f to follow up with the people who attend? But this happens all the time; nonprofit its work hard to bring major community leaders to their events. These dignitaries start to get excited about the cause, but then nothing happens for months to remind them about the organization. The excitement and momentum that was generated gradually fades away.

Sometimes clients will say to me," Why should we have a cultivation event? We had a great one last year but nothing ever came of it." When I ask why, I find out that the follow-up for the event was weak, or got pushed aside because of more pressing organizational priorities.

Two years ago, a client held a remarkably successful gala, led by board members, featuring the president of a country as keynote speaker. The event raised \$100,000. To this day group leaders are unsure whether there were any tangible long-term fundraising results from the gala. The Deputy Director mused recently about the event:

One could certainly argue that our positioning with donors was improved (getting a major country president to speak at your event is no small task); our image as an organization was enhanced, but other than raising \$100,000, which was great, did it bring in anything major subsequently? I would argue no. And that is a whole lot of work for \$100,000. Maybe energies could have been better spent cultivating a major gift in the \$1 million range, or more. These are the kinds of trade-offs and decisions that need to be made when deciding where to put our board and staff energy and resources. Was the event lovely? Yes. Will some people remember it? Yes. But I am not sure that translated into any real long-term strategic fundraising benefit.

My client is considering a common problem we all face with enthusiastic boards that tend to think in terms of events: is it all really worth it? Can't we raise the money more efficiently by focusing on major gifts? Of course the answer is yes! With better follow-up, perhaps staff or board members could have used the event as a springboard to cultivate an important group of prospects for major gifts. But the organization did not have staff assigned to focus on individuals for major gifts, so the follow-up never happened.

What is appropriate follow-up? Here is where staff and board can work together and share responsibility for follow-up calls.

The first thing to do is to prioritize the list of calls to be made. There should be a “must call” list and a “would like to call” list—broken down along the lines of the VIP and Friends mailing lists we described earlier. Any donors who are currently considering funding requests from your organization should be among the first called.

For example, if you have a proposal in to a foundation or corporation, be sure to call their representatives who attended first. Or, if you are trying to obtain an appropriation from the state legislature and several elected officials attend your event, follow up and thank them first.

Follow-up can be done in three ways: phone calls, personal visits, or an invitation to a second event. All these help to keep your organization and the recent event’s excitement fresh in the mind of your guest/prospect.

The magic open-ended question: “What were your impressions of. . . ? A simple phone call is easy. A board or staff member can call and ask the magic, open-ended question:” What were your impressions of the event?” This question is the *golden key* to finding out what is going on inside your prospective donors’ hearts and minds. It is open-ended enough to offer a safe platform for whatever comment your prospect wants to make.

I love this question. It has helped me many a time with prospects. When I was not sure about the next step or where the person’s real interest was, I could always rely on this simple question. It has saved my day when I did not know what to say, or was having trouble getting the prospect to talk to me. Ask the question and presto, you are off and running with the prospect in the lead.

You can make a follow-up personal visit if needed. Say an important philanthropist has attended your gala and appeared to be impressed by the event and your cause. Now the door is open for an Advice Visit with this person, which will move you into a closer relationship. If you miss the opportunity to make follow-up phone calls or personal visits, be sure the person is touched in some way by your organization within the first few months after the event. You can send out a newsletter with a personal note signed by a board member, or a personalized invitation to another event.

Follow-up is like spinning plates on sticks. One of my early mentors at Duke University had a great metaphor for following up. He described the process of cultivating major donors as much like the performance of the guy on the old Ed Sullivan show who would spin lots of plates up in the air on sticks.

He would run back and forth putting a little spin on plates that were getting wobbly. When all the plates were spinning around fast, he would take a breather to add yet another plate spinning in the air. When he was ready, he would stop one and take it off the stick.

Cultivating major donors is like this. You have to give enough personalized attention to each individual donor: keep each one’s plate spinning on a stick. Note that you can only handle a certain number before the quality of your attention drops and a plate falls. Face time is a vital

element of cultivating major donors – and it takes time to make personal visit and calls. When a donor is involved, excited, and ready to give, then you can stop spinning and catch a plate.