Case Study

Raising Fundraising Expectations

The congregation had experienced rapid growth when they moved to a newly constructed building in an area with many young Jewish families. They had attracted many of these young families (45 bar mitzvahs a year). They had a $1,500,000 mortgage left over from their capital campaign and were running a $50,000 a year deficit. Between the High Holiday appeal and other events they raised about $80,000. As a young congregation, they did not have a long history of fundraising. They depended on a few solicitors. The congregation held some fundraising events but they set no goals for net revenue. There was little calendar planning or consistent fundraising communications. Most members were relatively uninformed of the synagogue’s financial situation. While they were not raising enough money to cover their deficit or retire their debt many people felt “nickled and dimed” by various small appeals.

One night several Board members interrupted the Board’s planned agenda and began discussing some fundraising events that they had seen at other congregations. The Board had a full agenda but the President let the conversation go on. One member had a sister whose congregation did a dinner and a raffle. Another member had gone to a goods and services auction. So it went. Other members were commenting. After 20 minutes a Board member argued that they should consider creating an overall fundraising committee to manage this effort. One Board member volunteered to help. The President talked to him after the meeting in the parking lot and asked him if he would be the chair. Some members walked by them complaining about agenda items that had been deferred for lack of time.

At the next board meeting, the President announced the new Fundraising Committee to the board in his President’s remarks. He requested that the various fundraising events chairs work with the new Fundraising Committee Chair on this new umbrella group. There were 6 events chairs. Two were at the board meeting. There was no written charter provided to the committee.

The Fundraising Committee Chair was a hard worker but not a consistent communicator. There were some initial tensions when event leaders were...
Case Study

### Raising Fundraising Expectations

asked to go to the first Fundraising Committee umbrella meetings. Some were not sure why the meeting was being called. The office manager told some of the event chairs that she “really did not know what was going on.” Only three of the event chairs came to the initial meeting.

After 90 days of inaction by the Fundraising Committee Chair the executive committee agreed the fundraising committee needed more leadership. The VP for Finance agreed to be a liaison to the committee. The office manager had provided some logistical support for fundraising events but she was not always involved in the development of event strategy. The Rabbi felt that fundraising was very important but had not followed the developments around the new committee. The Fundraising Committee Chair and the VP of Finance set up a meeting with the event chairs and office manager. They asked the Rabbi for some ideas. The Rabbi sent the Fundraising Committee Chair an e-mail with some thoughts. The committee began to meet more often.

Fundraising contributions increased 50% over the next 12 months. Goals were set for every event and a new group of solicitors began to ask key sponsors and donors for specific amounts. Calendar planning allowed the most important events to be staged at most optimal times. The leadership placed more emphasis on revenue for the donor dinner by selling more tribute book spaces and raising the price of the ticket. In the past the dinner had been priced below cost to “make everyone feel welcome.” Now that there were goals for net revenue event chairs began to focus more on results. The Executive Committee really supported these fundraising changes and took time to acknowledge stories of success.

After 12 months, when his work situation changed, the Fundraising Committee Chair backed away from his volunteer work. The President now had a good idea of how the committee should work and so he got the help of his Executive Committee to find a replacement.
The story begins at a board meeting where a topic comes up spontaneously during a board meeting. This is a relatively new congregation where many organizational processes are yet to be defined. The topic is not on the agenda. It gains energy and leads to a 20 minute discussion on fundraising ideas. Like other emotional and reactive topics, this discussion unexpectedly “hijacked” the agenda and some planned agenda items were not addressed. One member showed an interest in working on the project.

The president considered the issue and recognized that improving fundraising performance was an important initiative. He decided to appoint the volunteer who offered to work on the project that night. On one hand it is great to have someone volunteer. On the other hand, the volunteer may not be the best person for the task.

The initiative does not start out well because only 3 out of the 6 events chairs attend the meeting. There was not much advance notice given. There was no written charter so there was nothing to send those that missed the meeting. The event chairs did not understand how they were being expected to coordinate their efforts. The staff person who was involved in logistics was not in the loop. One of the reasons we encourage that you create committee charters (job descriptions) is so that you will have a road map to review your plans with all of the stakeholders (event chairs, office manager, volunteers, VP liaison, etc.)

There is always a human dimension in delegation issues. The first volunteer who stepped up helped the committee get started. He faltered a bit by not defining the committee and not getting all of the stakeholders at the table.

When the VP for Finance stepped up, he brought stability and structure to the process and helped get all of the players at the same table. The team experienced some short term wins. They produced a 50% increase in fundraising net revenue. They went from $80,000 a year to $120,000.

Leaders have to provide feedback that is formative. It helps the team make little improvements and perform better going forward. The VP for Finance helps the chair get the process back on track. Leaders also need to provide feedback that is summative. Leaders have to make an assessment after

continued
### Case Study: Raising Fundraising Expectations

<table>
<thead>
<tr>
<th>Deeper Organizational Issues</th>
</tr>
</thead>
<tbody>
<tr>
<td>reviewing the larger body of a volunteer’s work and determine if a volunteer is a good fit for their job. In this case, the personality of the fundraising chair was not a perfect fit. He was somewhat disorganized, he traveled a lot and he was a little impatient. He was challenged by the role of coordinating and negotiating with many event chairs. When the chair resigned due to personal issues the president was able to help facilitate a better match for the job and implement lessons learned.</td>
</tr>
<tr>
<td>You can use these insights and reflections to help facilitate the group discussion about the case.</td>
</tr>
</tbody>
</table>