Charting a Path to 100% Participation in Fund Development

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So you’re a board member... now what?
What are your responsibilities?

Set Organizational Direction and Planning
- Mission & Vision Guidance
- Budgeting
- Strategic Planning

Maintain Accountability
- Code of Ethics
- Board & CEO Evaluations

Advance Marketing & Awareness
- Promote Mission
- Grow Public Profile
- Stay Informed
- Monitor Programs

Ensure Adequate Financial Support
- Personal Donation
- Fundraising Assistance
Bait and Switch

THANKS FOR COMING TODAY AND FOR AGREEING TO DO SOME VOLUNTEER WORK FOR OUR ORGANIZATION.

WHAT EXACTLY IS IT THAT YOU WANT US TO DO?

FUNDRAISING!!

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Mistakes

• Mistake #1: Fundraising is the first thing a board member is asked to do and everyone starts at the same place.

• Mistake #2: Making fundraising all about “asking for money instead of building relationships.”

• Mistake #3: Board recruitment does reflect organizational need and Board members do not see fundraising as their job

• Mistake #4: Lack of training, structure, coaching, and support.
Where to start?
Recruitment
Step # 1 - Recruitment

- Upstream engagement
- Clarity of Expectations
- Time Commitment
- Areas of Interest
- Financial Health of the Organization
- Strategic vision and plan
Board Member Engagement

Investment → Recruitment → Orientation → Involvement → Contribution → Leadership

BoardSource
Empowering Boards. Inspiring Leadership.
Board Member Engagement

Recruitment
- Upstream engagement
- Clarity of Expectations
- Time Commitment
- Financial Health of the Organization
- Strategic vision and plan

Orientation
- Clarity of Expectations
- Areas of Interest
- Finances of the organization
- Organizational Overview
- Mentor

Contributions
- Time
- Talent
- Treasure
- Donor Engagement

Involvement
- Committee Assignments
- Special Events
- Briefings
- Audits

Leadership
- Committee Chair
- Campaign Chair
- Event Chair
- CEO Review

Investment
- Major Gift
- Bequest
Funding

FAIRY TALES FOR BOARD MEMBERS

...so the wealthy philanthropist fell in love with Cinderella's organization and funded it ever after.

AGAIN, AGAIN!
Continuum of Fundraising

Identification → Qualification

Stewardship → Cultivation

Solicitation
Continuum of Fundraising

Identification

Qualification

Stewardship

Cultivation

Solicitation

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Fundraising Truths

- It is easier to upgrade a donor than acquire a new one.
- Donors require 5 to 7 contacts with the organization before they will make another gift.
- Cultivation and Stewardship are critical to all donor relationships.
- You do have to ask for a gift.
How some people view fundraising
Where to start
Imagine if Apple had to run like a nonprofit...

I'll pay $300 for this iPhone! But I want most of this money to be spent on direct costs. No more than $70 should be going to indirect costs like rent, insurance, etc. I also don't want any of this $300 to go towards advertisement or staff salaries...
Critical Success Factors

Expectations
- Personal contribution AND participation in fundraising

Culture
- Organization makes it easy
- Public celebrations
- Fun/rewarding atmosphere
- Collaboration among members and with staff

Infrastructure
- Staff support
- Leadership
- Tools and Support
Don’ts

- Ask Board members to come up with a list
  - This is intimidating and usually unproductive

- Give Board members a list and tell them to go solicit
  - Board members need support and direction

- Only ask for updates at Board meetings
  - No sense of Urgency
  - People forget or put it off
Continuum of Fundraising

- Identification: 5%
- Qualification: 5%
- Solicitation: 40%
- Stewardship: 10%
- Cultivation: 40%
Beginning

• **Stage: Stewardship**

• **What:** Assist with thanking and informing existing donors

• **How:** Thanking and recognizing donors for their support

• **Points to consider:**
  
  • This could include personalizing hand-written notes/cards, recognizing donors at events, sending emails, or making personal phone calls
  
  • Staff typically provide support needed to carry out your tasks
  
  • As fellow supporters, Board members offer a unique and valuable perspective. Tell donors why the organization is important to you and ask why it is important to them
Informed

• **Stage:** Cultivation

• **What:** Build the relationship through active engagement and follow up

• **How:** Be an ambassador!

• **Points to consider:**
  
  • Call, meet with, or reach out to a prospect
  
  • Host an event or dinner
  
  • Invite friends and prospects to events
  
  • Spread the word through your networks
  
  • Get their attention, build the relationship, explain the impact

• No matter how great an investment your program may seem, most donors still give primarily give to organizations they feel an emotional connection to
Board Members are Connected

- **Stage**: Identification
- **What**: Identify prospects from your network who are potential donors
- **How**: Consider your network of personal and professional contacts and provide names to development staff or committee

**Points to consider**:
- "Small world" phenomenon/six degrees of separation: everyone is connected to everyone by a few people
- Where do you start?
  - Personal connections
  - Donor lists of similar organizations
  - Professional group databases, networking, events, social media, etc.
- Consider why people ultimately give:
  - They are ASKED!
  - Mission alignment
  - Personal involvement in organization
  - Example of others already involved
Leadership & Experienced Members

• **Stage:** Solicitation

• **What:** Make the ask

• **How:** Ask a new or returning donor to give!

• **Points to consider:**
  - Either alone or in conjunction with staff or board members
  - Staff should provide you with the necessary research, materials, and administrative support
  - Only 10% of fundraising cycle

“Next time, could you keep a straight face when we’re asking for a million dollars?”
What do we need to succeed?
Tool Kit

Materials and Case for Support

- Case Statement
- “Elevator Pitch”
- Message Platform
- Custom proposals highlight message platform, present value propositions, and outline benefits

Staff Support

- To Do list
- Prospect research: staff can provide support and complete background research on donors as needed
- Wealth Screening
- Cultivation and Solicitation advice
- Event support
- Stewardship follow up
Individualized approach

- Individual Board Member Engagement Plans
- Direct outreach from Board leadership – Chair
- Make it easy for them
- Respect their concerns
- Mentoring/Partnering
- Meet them where they are
- Inspire them
Why do you serve?

I am making a difference in the lives of others.

#ANGELAFFIRMATIONS  WWW.ASK-ANGELS.COM