

# ENGAGING **ALL** YOUR BOARD MEMBERS IN THE FUNDRAISING PROCESS

*Board Development Training Series – March 29, 2017*

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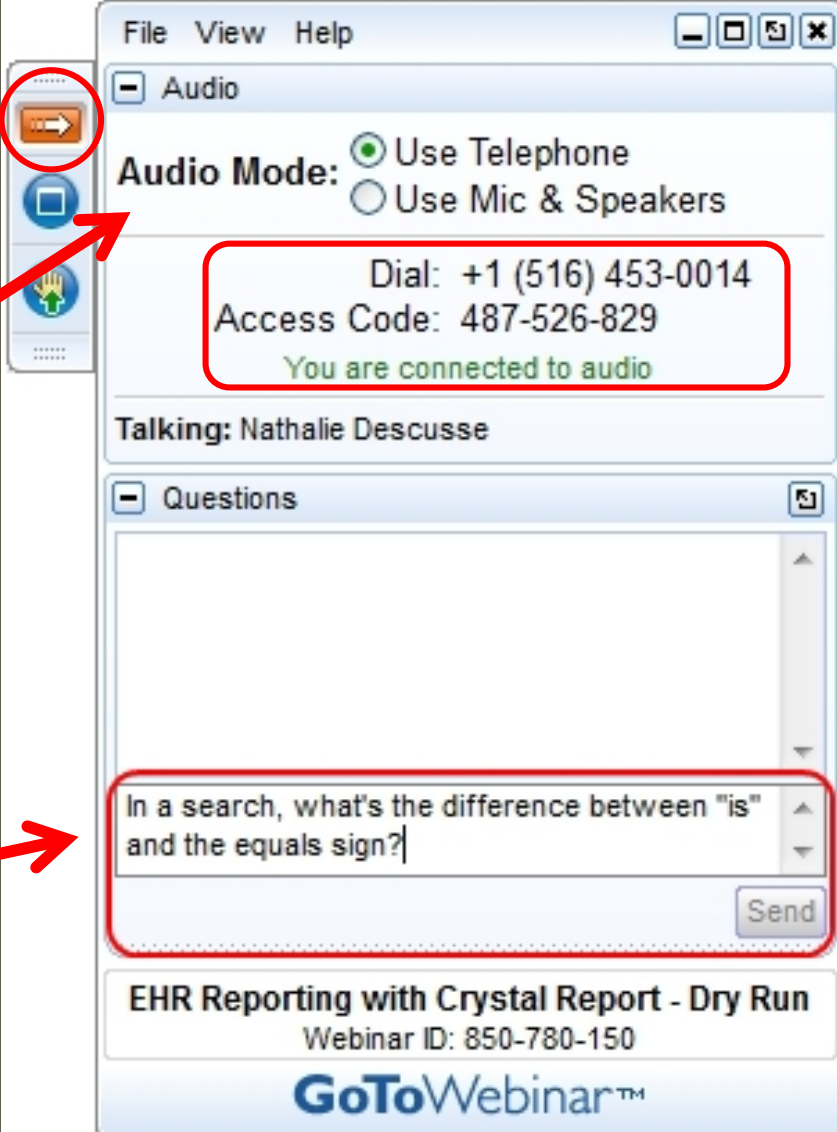
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# THE GO TO WEBINAR INTERFACE

1. 20 minute presentation via “audio only” mode
2. Listen on computer/device or by calling in to the conference #
3. 10-40 minutes for Q&A
4. Submit questions via webinar controls



The screenshot displays the GoToWebinar interface with several key elements highlighted by red boxes and arrows:

- Audio Mode:** A red circle highlights the "Audio" icon in the top-left toolbar. Below it, the "Audio Mode" section shows "Use Telephone" selected with a radio button, and "Use Mic & Speakers" unselected.
- Connection Information:** A red box highlights the dial-in details: "Dial: +1 (516) 453-0014" and "Access Code: 487-526-829". Below this, a green status message reads "You are connected to audio".
- Questions:** A red box highlights the "Questions" section, which contains a text input field with the question: "In a search, what's the difference between 'is' and the equals sign?". A "Send" button is located to the right of the input field.

At the bottom of the interface, the title "EHR Reporting with Crystal Report - Dry Run" and "Webinar ID: 850-780-150" are visible, along with the "GoToWebinar™" logo.



# BOARD FUNDRAISING WEBINAR OVERVIEW



1. Fiscal Responsibilities
2. Requirements & Expectations
3. Developing a Plan
4. Training & Support
5. Alternatives to the “Ask”
6. Tracking Implementation
7. Celebrating Success



# LEGAL DUTIES OF DIRECTORS

1. Duty of Care
2. Duty of Loyalty
3. **Duty to Manage Accounts**
4. Duty of Compliance

## **Duty to Manage Accounts:**

Ensure financial accountability and that the organization maintains fiscally responsible and sustainable operations.

- Establish an annual budget
- Ensure proper use of restricted funds (grants) and public donations
- Accurate financial records
- Establish financial management and internal accounting policies with checks & balances
- **Establish fund-raising: plans, policies, requests, honest appeals**
- Ensure transparency and public accountability with respect to use of financial resources and assets



# MAINSTREET BOARDS: WORKING VERSUS GOVERNING? ACTUALLY BOTH!

## MainStreet/ACD Boards

Focus on implementing revitalization projects, while also maintaining traditional roles of policy development and governance

**Governance Work**

**Program Work**

**Fundraising Work**

All Boards have the fiduciary duty to help their organization fundraise and to use those funds responsibly in service to its mission.



# SHARE YOUR FUNDRAISING EXPECTATIONS WHILE RECRUITING

- **Recruit** and orient board members with clear expectations.
- **Communicate** that contributing and bringing resources into the organization is part of the job description.
- Not communicating this, or recruiting board members who refuse to fundraise, sets the board up for **fundraising failure and frustration**.
- **Create** a Board Member Give/Get Commitment Form and **require** a donation of some sort from each board member.

## SAMPLE BOARD MEMBER GIVE/GET COMMITMENT FORM

Each Board member should give what he or she can. Some will be able to give more than others, but every Board member must give annually to set the example for other donors and funders.

Name \_\_\_\_\_

My personal giving goal:

I personally pledge \$ \_\_\_\_\_ to the Theatre to support our resource development goals.

I will make:

- One annual payment
- Quarterly payments of \$ \_\_\_\_\_
- Monthly payments of \$ \_\_\_\_\_

My goal for getting donations:

As a Board member, I will personally get (raise) at least \$ \_\_\_\_\_ from outside sources.

I will solicit \$ \_\_\_\_\_ for the \_\_\_\_\_ special event.

I will assist in building our donor base by soliciting a total of \_\_\_\_\_ new donors.

I will \_\_\_\_\_

I agree to participate in other fundraising as needed. I accept this commitment as an understanding of my responsibilities as a Board member.

\_\_\_\_\_  
Signed

Date \_\_\_\_\_



# WHY REQUIRE BOARD MEMBERS TO GIVE?

- ❖ Creates “skin in the game”.
- ❖ Indicates the board member has committed to the organization and its mission.
- ❖ Makes public declaration that board member has invested in the program.
- ❖ Encourages other donors to give, by example
- ❖ Impresses grantors and other funders, some of whom require 100% board giving
- ❖ **Remember that not all board members can give at the same level.**



**LETS GET STARTED!!**

**But WAAAAAAAIIIIIT?**

**HOW do board members get involved in fundraising?**

**WHAT do they actually need to do?**

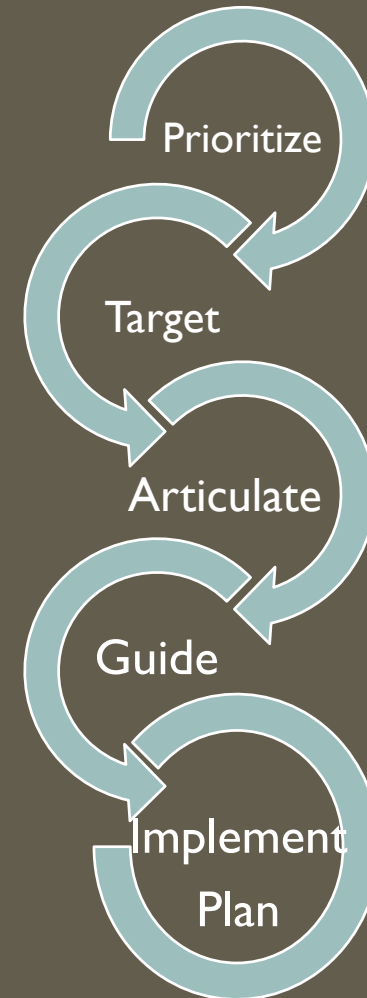
**We need a PLAN!!!**





# WHY DO YOU NEED A FUNDRAISING PLAN?

- **Prioritize** your projects
- **Target** your resources and energy effectively
- **Articulate** your goals and activities to potential donors
- **Guide** the actions of the individuals involved in the campaign
- **Provide** structure and **create** a timeline for implementation



# WHO SHOULD BE INVOLVED IN DEVELOPING THE PLAN?

- **Board of Directors**

- Leading development of fundraising strategies
- Setting fundraising goals
- Ensuring the organization has people, budget and other resources needed to meet revenue goals

- **Staff**

- Providing input into the planning process
- Supporting the Board's strategies and goals
- Driving implementation of the plan

- **Stakeholders** (current donors, volunteers, clients, other community leaders, etc.)

- Sharing their ideas, contacts, talents and skills (this also applies to staff and board members!)



# EFFECTIVE EDUCATION & TRAINING

People who say they won't assist with fundraising often mean,  
"I don't feel comfortable with or know how to ask someone for money."

## Hold a board retreat or fundraising training session

- Guest Speaker – successful fundraiser from another board
  - Bonus if they were a “reluctant” fundraiser
- Internal Expert – experienced fundraiser from the board
  - Shares the basics of their fundraising approach
- Board members practice and develop:
  - Pitch
  - Mission Moment

## Educate

Board members must understand:

- Mission of the organization
- How it benefits the community
- Reason you are fundraising
- Benefits to donors and/or sponsors

**Resource development training is required for fundraising success and an ongoing process.**



# THE “PITCH”



- Two Components
  - Organization description
  - A pitch, aka the ask or call-to-action
- Develop a succinct description of your organization
  - Don't use jargon or unnecessarily formal language
- Engage your audience
  - Encourages them to learn more about your organization
  - Excite them to become involved.

The “Pitch” is your elevator speech. Use it when you just have a few minutes to share your message.



# THE “MISSION MOMENT”

- Short inspirational examples of how your organization is making an impact
- Convey to donors what your org does, even if they have never participated
- Use real people – volunteer, business owner, vendor, board member, staff
- Keep your story under **two minutes**
  - Donor should ask questions at the end
- Share real results
- **AGAIN, Don't use industry-related jargon!**

## Four Elements:

1. An example of how your organization has helped an individual, group, business, community, etc., including exact results, both tangible and intangible.
2. Specific Messages about the project, event, program, etc.
3. Your money story – how much do you need to raise? How much have you raised so far? What does raising that money mean for your organization, the district, community, etc.?
4. Why does your organization exist? What is its purpose?



# FUNDRAISING SUPPORT

- Develop a donor portfolio for board members
  - List of prospective and existing donors to cultivate and steward throughout the year.
  - Phone calls, face-to-face meetings and interaction at organization events.
  - Create ownership, build relationships
- Veteran board fundraisers mentor the least comfortable or newbies.
- Staff accompany board members on face-to-face meetings.
- Board president and/or staff meet one-on-one with board members to discuss their fundraising comfort level/progress
- Arrange some fundraising “wins”
  - Pre-solicit a donation over the phone
  - Take a first-time fundraising “asker” to meet the donor and test out their “mission moment” story
  - Donor is ready to give, “asker” gets a “win”

## Resource Development Materials

- Solicitation Letter · Organization Brochure
- Sponsorship Forms · Annual Work Plan
- Economic Transformation Strategies
- History of Board Financial Support · DVDs



# FUNDRAISING “ASK” ALTERNATIVES

Remember, **FUNDRAISING** is a skill that can be learned!

However, some people will **NEVER** be comfortable with the “ASK” ...

Break fundraising plan activities down into simpler tasks.

Provide a checklist that allows board members to select (or not) specific activities and tasks.

There are **MANY** tasks involved in the fundraising process:

Research · Planning · Organizing

Recruiting · Relationship Building

Outreach · Materials Development

**Don't lose the help of a board member because they are not comfortable making the “ask”!**

**Give every board member a fundraising task!!!!**



# CREATE A LIST OF FUNDRAISING TASKS

- Develop fundraising plan
- Identify fundraising activities
- Plan fundraising \$\$ pyramid
- Set fundraising timeline
- Brainstorm potential donor names
- Research service club funders
- Research donations to other nonprofits
- Research online giving platforms
- Create fundraising videos
- Create fundraising brochures
- Update website to reflect new campaign
- Write fundraising email/e-newsletter
- Write letters to personal contacts
- Add hand-written sticky notes to letters
- Participate in face-to-face “asks” with the staff
- Place follow up phone calls
- Use social media to promote fundraising events
- Host donor receptions
- Assist in presentations to other organizations
- Call donors and personally thank them
- Make donor thank you gifts
- Handwrite thank you cards





# TRACKING TASK IMPLEMENTATION

The board is trained and has identified which tasks they are willing to undertake.

How do we track their progress and ensure tasks are being implemented?

- Develop a timeline matrix of board fundraising tasks to track progress
  - Prior to each board or fundraising committee meeting, ask each board member to update the matrix, and then review progress at the meeting.
- Make fundraising a regular agenda item at each board meeting.
- Hold everyone accountable for their commitments and task implementation.



# CELEBRATE SUCCESS

Board members require the same care and attention as all volunteers.

Though they have a **fiduciary duties** to the organization, they deserve **acknowledgement** and **praise**.

Remember, when working with money, it's very easy to measure success!!





# QUESTIONS?

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