



CULTIVATING A BOARD OF FUNDRAISERS

JULY 27, 2023



HW & Co.[®]



CPAs & Advisors

BVU: What We Do

CONNECT

*Board Matching,
Skills-Based &
Direct Service
Volunteering*



CONSULT

*Consulting to strengthen
nonprofit excellence and
business impact*

EDUCATE

*Leadership development,
nonprofit governance,
corporate social
responsibility*



FREE RAFFLES

1 entry per raffle per person

Green Raffle **(Donated by Speakers)**

1 Hour of Fundraising
Consulting with Raising Results

Fundraising Exercises Book:
*"Train Your Board
(and Everyone Else)
to Raise Money"*

Pink Raffle **(Donated by BVU)**

1 complimentary
seat to BVU's Civic
Leadership Summit
on October 24

Welcome Speakers!



Carolina Masri
Consultant and Former
Executive Director,
MedWish International



Christine Kohls
Founder & Principal
Raising Results LLC



***CULTIVATING
A BOARD OF
FUNDRAISERS***



AGENDA

- 16 ways to engage your board
- 3 actions you can take today
- Q & A
- Thank you!
- Closing

Have you found yourself saying, "I wish my board was more helpful with fundraising?"

Poll

WHO IS IN THE ROOM TODAY?

Boardsource 2021
Leading with Intent
 survey of
 131 Board Chairs
 and 689 Nonprofit
 CEOs

Area of Board Performance	Chief Executives	Board Chairs
Understanding The Organization's Mission	B+	A-
Projecting a Positive Public Image of The Organization	B-	B-
Knowledge of The Organization's Programs	B-	B
Level of Commitment and Involvement	B-	B-
Understanding The Board's Roles and Responsibilities	B-	B-
Understanding The Context (Funding Landscape, Public Policy Environment, Other Organizational Players, Etc.) In Which The Organization Is Working	C+	B-
Evaluating The Chief Executive's Performance Against Goals	C+	B-
Building Relationships Within The Community That Help Support and Inform The Organization's Work (Separate From Fundraising)	C+	C+
Building a Diverse and Inclusive Board With a Commitment To Equity	C	C+
Monitoring Legislative and Regulatory Issues	C-	C+
Leveraging Board Connections and Networks To Influence Public Policy Decisions	C-	C
Fundraising	C-	C-

Grading Board Performance

Since 1994, survey respondents have given fundraising one of the lowest grades.

In 2021, it ranked at the bottom.

How important is fundraising in terms of your expectations for the board?	Chief Executive	Board Chair
Very important	70%	61%
Important	20%	24%
Somewhat important	7%	10%
Not at all important	3%	6%
How would you grade the board's performance in fundraising?	Chief Executive	Board Chair
Excellent	4%	8%
Above average	15%	17%
Average	33%	26%
Below average or Failing	48%	50%

Grading Board Performance

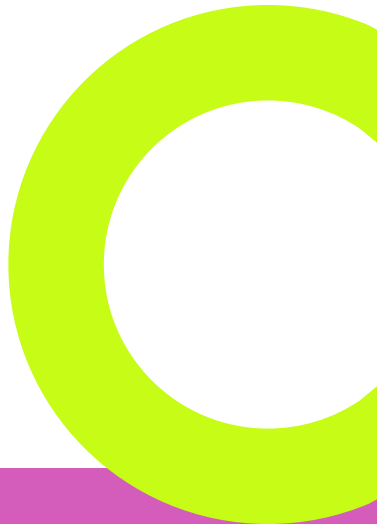
Board members are people too.

What do you want them to think, feel, and do?

Engaging Your Board

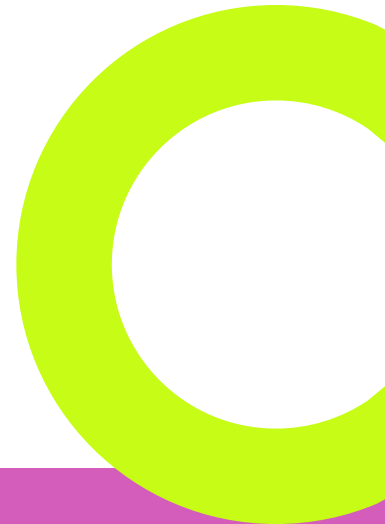
Know what you want and need from your board members.

Before you can engage board members to help you fundraise, they need to understand what your organization needs. Your board must clearly see your vision and where they fit in advancing it.



Grow your board.

Re-energize your board by recruiting new members.



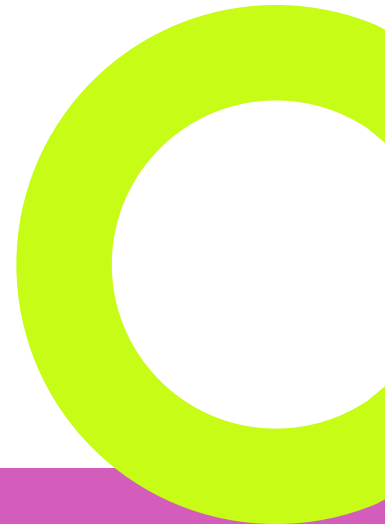
IDEA #2

Board recruitment

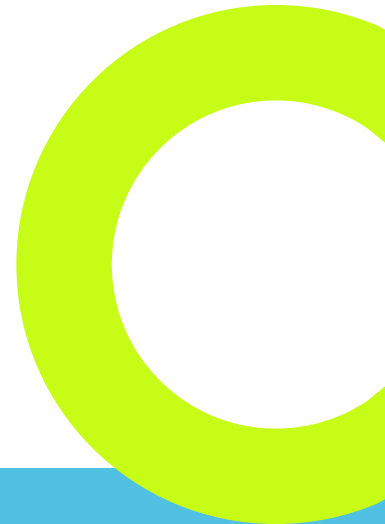
Recruit with a plan and set clear expectations from the beginning.

This is one of the most strategic and important jobs in partnership with the existing board.

Time Commitment: Be clear about the commitment. Meetings, events, stewardship activities, etc.



Provide orientation to new board members.

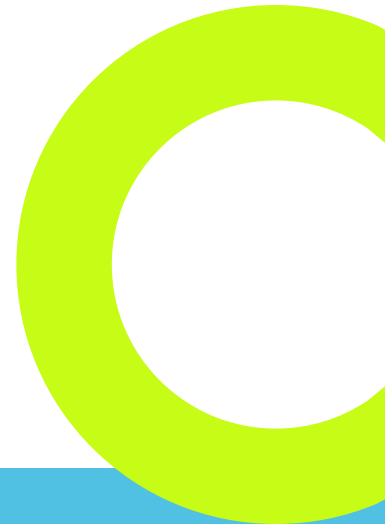


IDEA #4

Onboarding

Meet with each board member personally.

Understand the strengths and interests of each member.



IDEA #5

Onboarding

Sample: Fundraising Commitment Form

Name: _____

I understand my financial commitment is necessary to ensure the success of XYZ Org.

My company (firm) and/or I will participate in the following ways this year:

Dinner Gala (\$100/ticket; sponsorships from \$500-\$10,000) \$ _____

Golf (\$200/ticket; sponsorship opportunities from \$500 - \$5,000) \$ _____

In order to achieve 100% participation of the board, I personally pledge \$ _____

TOTAL \$ _____

For my personal gift, I would prefer to make: One payment Quarterly payments of \$ _____

My company will match my donation (I will submit the matching gift form with my payment(s)).

Please make gift or first pledge payment by January 31, so we can start the year with 100% participation.

As a board member, I agree to serve on the following committee(s) this year (check all that apply):

Fundraising

Dinner Gala

Finance

Golf

Governance

Nominating/ Board Development

I would like to help with donor identification, cultivation, stewardship (check all that apply):

Host an informational event in my home

Make thank you calls to donors (from home or office – 10 calls per year)

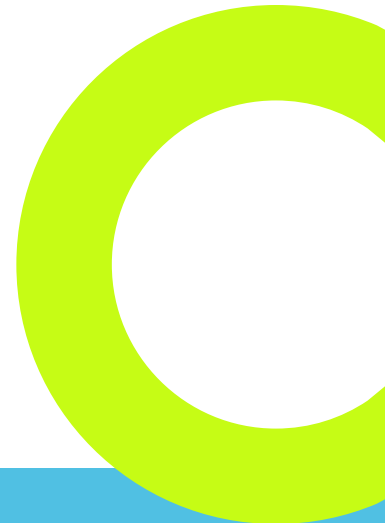
Add personal notes to solicitations and thank you letters (in XYZ office 4 times per year)

Bring colleagues, friends and family to fundraising and cultivation events

Add 5 or more new names to our mailing list as potential volunteers or donors

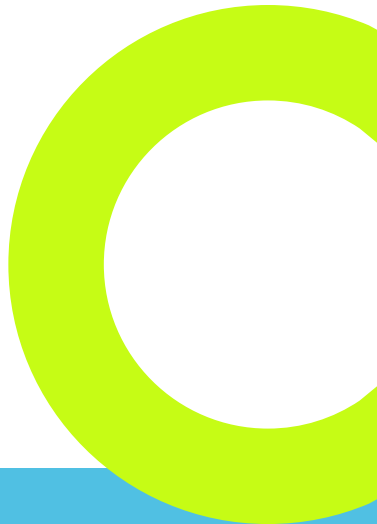
IDEA #5

Onboarding



Keep it short and simple!

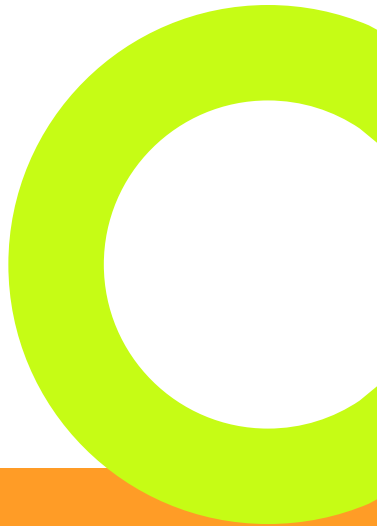
Board members are busy! If you expect too much, or your expectation isn't crystal clear, they won't follow through.



Plan an annual board retreat and discuss what fundraising (actually) means.

IDEA #7

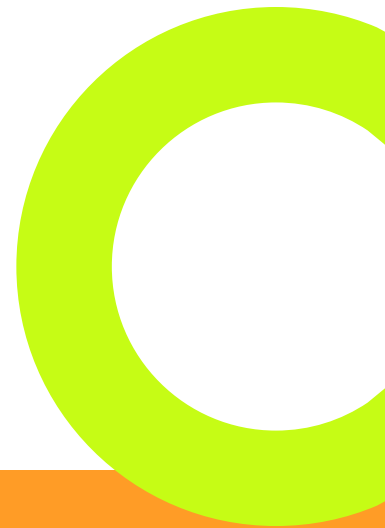
Fundraising
conversations



Keep fundraising front and center at every board meeting.

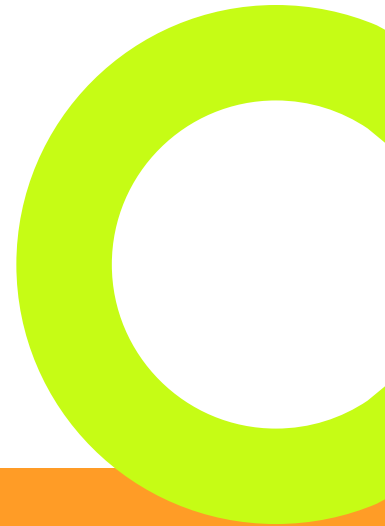
IDEA #8

Fundraising
conversations



Create opportunities for each board member to experience the mission personally.

Encourage to develop their “why” story.



IDEA #9

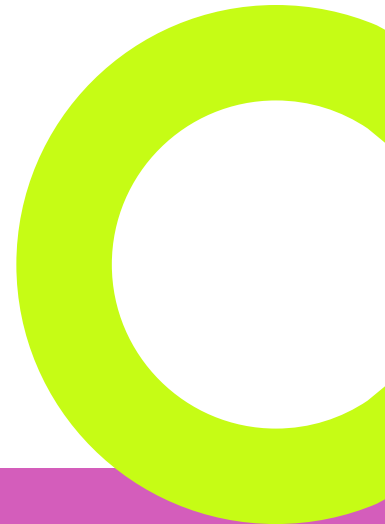
Fundraising
conversations

Start slow and build to more challenging projects.

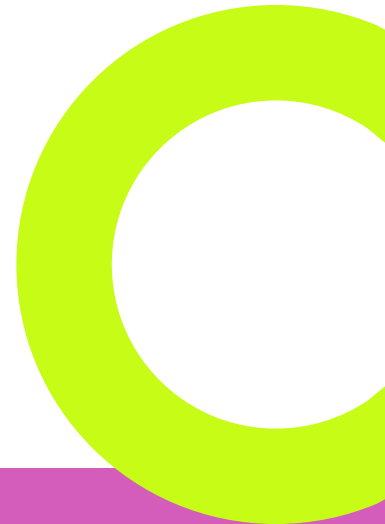
Start: writing thank-you notes, making calls to thank donors.

As they get more involved: provide tours, speak at local events.

As they continue to grow as ambassadors: perhaps they can start soliciting for auction items, obtaining a corporate sponsorship from their employer, etc.



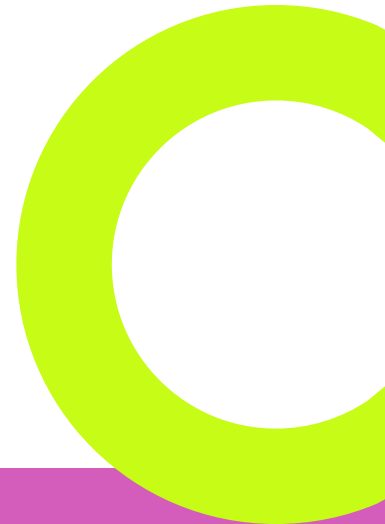
Involve the board in goal setting.



IDEA #11

Fundraising engagement

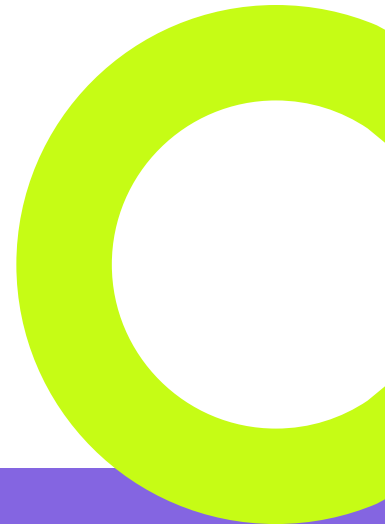
Don't wait for your board to initiate action.



IDEA #12

Fundraising engagement

Give them the resources they need to be successful.



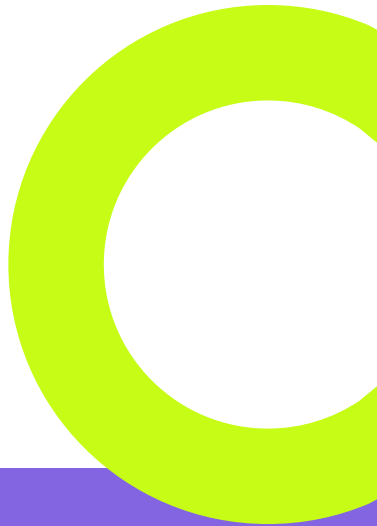
IDEA #13

Fundraising action

Be prepared to cultivate new donors on their behalf.

IDEA #14

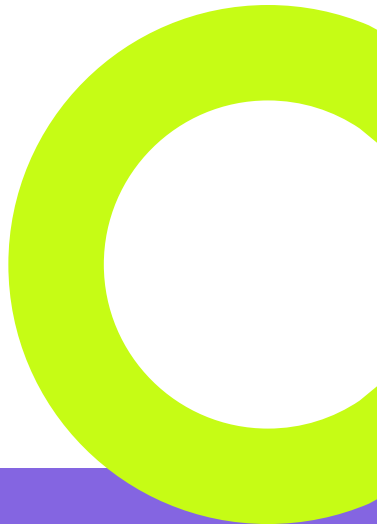
Fundraising action



**Thank each trustee warmly, profusely,
and genuinely.**

IDEA #15

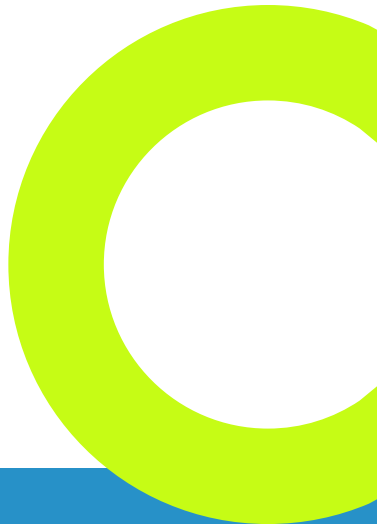
Fundraising action



Use a board report card or self-assessment.

IDEA #16

Reflection



BOARD MEMBER SELF-ASSESSMENT

For Board members to assess their individual performance on the Board of Directors.

Board members should review their job descriptions or agreement prior to completing this self-evaluation.

How would you rate your performance on the following Board duties?

Board Duties	Excellent	Average	Needs Work
1. Attending Board meetings, including retreats, training sessions and committee meetings.			
2. Completing assignments and coming prepared to meetings.			
3. Participating in fund development planning and activities.			
4. Serving as an advocate for your organization within the larger community.			
5. Staying up-to-date on purpose, history, needs, and issues affecting the organization.			
6. Participating actively in the ongoing work of the Board.			
7. Giving to the Board annually.			
8. Actively asking questions and seeking information needed to carry out responsibilities.			
9. Behaving in accordance with the organization's mission, vision, values, and governing documents.			

How has your Board experience contributed to your personal or professional development?

What could be done to improve your satisfaction with this Board?

How can the Board best support you in meeting your responsibilities as a Board member?

What three ideas will you use?

TAKEAWAYS

Your call to action



How do you help the board recognize and understand the amount of staff work it takes to fundraise - and why their help is so valuable and needed?

Questions & Answers



- How do you help the board be more proactive and responsive?
- When we ask them about next steps, many board members will say they're "thinking about it."
- How can we move them to action?

Questions & Answers



How can we encourage board members to help us formulate a plan for reaching out to their contacts (warm introductions, networking events, etc.)?

Questions & Answers



TEAM EXERCISE

- Practice this prospecting exercise today.
- Do this with your board tomorrow.

THE ABC'S OF IDENTIFYING PROSPECTS

Everyone knows potential donors—even people who say, “I don’t know anyone who has money.” Indeed, the average adult has relationships of some sort with 150 to 200 people (we’re not even including social media “friends”), and about 70 percent of those people support charitable organizations. This exercise provides a systematic way of sorting through your relationships to identify prospects.

Why Do This Exercise?

To help address the myth that “philanthropy comes from wealthy strangers that I don’t know”

Use This Exercise When

You want your board, staff, and volunteers to help expand your prospect pool or deepen outreach to current donors

Time Required

20 minutes

Audience

Anyone involved with your

fundraising campaign: some combination of board, staff, and volunteers

Setting

Anywhere you gather to work on your campaign plan and train your participants—preferably with people sitting in a circle or around a table

Materials

- Flip chart paper and markers
- Prospect Form (page 109)

FACILITATING THE EXERCISE

1. Introduce this exercise by telling participants you want their help with thinking about current donors and also expanding the pool of potential donors. Let them know that, while you’ll be asking for names of people they know, no one will solicit these prospects without the permission or involvement of the recommender.
2. Write the following on the flip chart:
ACCESS
BELIEF
CAPACITY
3. Explain that these are the three criteria for identifying prospects.

ACCESS: Do they have a relationship with any of our board members, staff, donors, or key volunteers? Are they already contributing money, time, or both to our organization?

BELIEF: Do they care about our issues or programs, or those who benefit from our work? Some organizations have broad appeal, while others will appeal to a narrower group of people.

CAPACITY: Are they charitable? Do they give to other organizations?

People who meet these three criteria are legitimate *prospects* and should be asked to contribute (or perhaps asked to contribute more). Note that the ABC formula makes it easier to remember the definition of the word *prospect*.

THE ABC'S OF IDENTIFYING PROSPECTS

4. Emphasize that the order listed above—access, belief, capacity—is also the proper ranking when weighing these criteria. To state this differently, the relationship is the most important factor. People who are new to fundraising tend to begin by asking, “Who’s rich?” rather than “Who do we know?” This is exactly backwards.

5. Hand out copies of the prospect form (page 109). Talk people through the headings, explaining that:

- a) *Contact*. They should write names, but don’t need to include contact information at this time. That will be collected later.
- b) *Relationship to you* is straightforward: friend, coworker, cousin, and the like.
- c) *Believes in cause?* This can be answered with a yes, no, or a question mark. Because you’re listing individuals you know, you should have some sense of their values and interests.
- d) *Gives to nonprofits?* This doesn’t refer specifically to your organization but rather, “Is this person charitable? Does he or she contribute to nonprofits?” Again, this question can be answered with a yes, no, or a question mark.
- e) *Gives to us?* Has this person ever given to our organization? Use a yes, no, or question mark.
- f) On *Gift range*, encourage participants to either make an educated guess about the amount the prospect might give or leave this column blank if they’re completely stumped.

It will be helpful to remind everyone that about 70 percent of Americans contribute to nonprofit organizations, so we can assume that seven out of ten people we know are donors. While this exercise is designed to identify new prospects, let participants know they can also include current donors to be “upgraded” or asked to give a larger donation.

6. Ask them to leave the first line blank; it will be filled in at the end of the exercise. Then instruct them to sit quietly, flip through their “mental Rolodexes,” and begin writing names. Encourage participants who have smartphones, tablets, or other devices to use them, since these devices are full of personal contacts. Allow them about ten minutes to get as far as they can with the prospect form. Some will fill up the form and start writing more names in the margins; others will struggle. It’s important to encourage everyone and not make this activity competitive.
7. After ten minutes, ask for attention. On the principle that you can’t ask others until you have given yourself—this is one of the basic tenets of fundraising—instruct each person to write his or her own name on the first line and, if they’re ready, to include the amount of their gift. Those who are uncomfortable writing the amount of their gifts while others are present can add the amount later.

THE ABC'S OF IDENTIFYING PROSPECTS

8. Finally, thank everyone for sharing their names. Suggest a process for adding contact information, collecting the forms, and entering them into your database or creating a master list. For example, ask everyone to bring their completed forms to the next board meeting, where the development committee will collect and compile them.
9. Explain that the next step (for a future meeting) is to talk through the names together and decide how to “segment” them: which prospects will be approached in person, or invited to a house party, or added to the mailing list for appeal letters, or added to the phone bank call list, and so on.
10. Debrief the exercise using the following questions:
 - What was your experience thinking about potential donors? How did you choose to filter people in or out?
 - Has your perspective changed on the question “Who is a prospect?” If so, how?
 - Did this exercise change your thinking about your own giving? If so, how?



What are quick and easy ways for board members to make introductions to their networks?

What materials/support is useful?

Questions & Answers




What else would you like to know?

Questions & Answers



WHAT WE LEARNED TODAY

- 16 ways to engage your board
 - 3 actions you can take today
- 

The background features a large blue circle on the right side, partially overlapping a smaller green circle at the top. On the left, there are several concentric, wavy lines in shades of pink and purple, creating a ripple effect. In the top right corner, there is a grid of small white dots.

THANK YOU!

MORE ABOUT RAISING RESULTS



FREE VIRTUAL SERIES



AUG 9

Leveraging Data
to Tell Your
Impact Story

SEP 6

Tech Planning:
What You Need and
How to Fund It

OCT 4

Preventing a
Data Breach: The
#1 Priority for
Nonprofit Leaders



Join us for three lunchtime webinars hosted by BVU with support from the Cleveland Foundation and content from Tech Impact

Ask the Expert: Week of Sep. 18

Meet with a skills-based volunteer for a **60-minute** one-on-one session to get assistance in areas like HR, Marketing, Finance, and Technology.

FREE for all nonprofits



ask the
EXPERT



CIVIC LEADERSHIP SUMMIT
HEALTHY TEAMS FOR HIGHER IMPACT

October 24

8:00am-12:00pm

Tinkham Veale
University Center
@ CWRU

Thank you

Business Volunteers Unlimited (BVU) engages, connects,
and strengthens businesses, nonprofits, and the
community.



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