Supercharge Your Fundraising Board
Moderated by:

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Fundraising Academy
FUNDRAISE

YOU’VE GOT A CAUSE. LEARN HOW TO FUND IT.
Our Affiliate Partners

- National University System (Founding FA)
- City University of Seattle (WA)
- Candid (CA)
- Maricopa Community College District (AZ)
- Texas A&M International University (TX)
- Xavier University of Louisiana (LA)
- Long Island University (NY)
- Candid (NY & DC)
- Howard University (D.C.)
- Kentucky State University (KY)
- First Tee (FL)
- Nova Southeastern University (FL)
TODAY’S PRESENTER:

Hannah Berger
Sr. Director of Individual Giving & Communications
A Place Called Home
Objectives

- What makes a strong board?
- How to establish expectations from the beginning
- Techniques for board engagement in fundraising
The Cause Selling Cycle

Phase One
Phase Two
Phase Three

THE EIGHT-STEP CAUSE SELLING CYCLE represents the steps good fundraisers take to become great fundraisers!
Traditional Fundraising vs. Cause Selling

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<tr>
<th>PHASES</th>
<th>TRADITIONAL MODEL OF “ASKING”</th>
<th>PERCENTAGE OF TIME SPENT IN EACH PHASE</th>
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<tbody>
<tr>
<td>APPROACH</td>
<td>TELLING</td>
<td>10%</td>
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<tr>
<td>IDENTIFYING NEEDS</td>
<td>QUALIFYING</td>
<td>20%</td>
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<tr>
<td>MAKING THE PRESENTATION</td>
<td>PRESENTING FEATURES</td>
<td>30%</td>
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<tr>
<td>RESISTANCE &amp; GAINING COMMITMENT</td>
<td>CLOSING LONG &amp; HARD</td>
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<tbody>
<tr>
<td>APPROACH</td>
<td>BUILDING TRUST (RAPPORT)</td>
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<tr>
<td>IDENTIFYING NEEDS</td>
<td>PROBE, ASK, QUESTION &amp; LISTEN</td>
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<tr>
<td>MAKING THE PRESENTATION</td>
<td>SELL BENEFITS</td>
<td>20%</td>
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<tr>
<td>RESISTANCE &amp; GAINING COMMITMENT</td>
<td>REASSURE “MAKING THE ASK”</td>
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Board members can help you build that relationship!
Board Recruitment

*What does the organization need? What does it already have?*

- Roles & Responsibilities
- Diversity, Equity, & Inclusion
- Code of Ethics
- Succession Planning
- Prospecting
1. Determine mission and purpose
2. Select the chief executive
3. Support and evaluate the chief executive
4. Ensure effective planning
5. Monitor and strengthen programs and services

10 Board Responsibilities
6. Ensure legal and ethical integrity

7. Enhance the organization’s public standing

8. Build a competent board

9. Ensure adequate financial resources

10. Protect assets and provide proper financial oversight
Board Retention

- Board members need to feel **valued**
- Board members need **good governance**
- Board members need to **stay connected** to the **mission**
- Board members need **mentoring and support**
- Board members need **ownership**
- Board members need **training**
How to Boot a Problem Board Member

The board president should deal with problems quickly.

Common problems that board members may display:

- Low attendance/participation
- Argumentativeness
- Bullying
- Rudeness and generally showing lack of interest

There is no one-size-fits-all solution to these problems. It might take some sharp and direct confrontation.
How to Boot a Problem Board Member

Your organization's bylaws should include *standards of conduct for the board and term limits*.

- Be sure that your organization’s policy aligns with state regulations.
- You can usually find these regulations in the corporations code of your state's statutes.
How to Boot a Problem Board Member

You could also organize a *board workshop to build morale, fight burnout, and reenergize your board members.*

- In addition, you might ask experienced board members to mentor new ones for a few months.
- Many problems may be preempted if board members can use their mentors as a resource and sounding board.
Everyone can be a good fundraiser!

• Establish from the start that fundraising is an expected activity.

• Make it clear to the Board that every one of them is capable of participating in some aspect of the fundraising process…

It’s not all about asking for money
Everyone can be a good fundraiser!

• **Manage up** – establish your role as their mentor.

• Take away the mystery of fundraising by breaking it down into **simple, clear tasks**.

• Communicate how their work fits into the **bigger picture**.

• **Teach** them the case.
Nonprofit is a tax status, not a business model!
What is the biggest barrier your board must overcome to be successful fundraisers?

Tell Us in the Chat!
Roles in Fundraising

Stewards
- Thank Thank Thank Again

Prospectors
- Identify Prospects

Solicitors
- Ask for Support

Cultivators
- Cultivate and Involve
- Thank Thank Thank Thank Again
Prospectors

• Good donors may be good business contacts for securing corporate grants

• Help identify names of people who may be interested in participating in your organization

• Show an interest in your mission or who have shown a philanthropic capacity and interest with other similar organizations
Cultivators

- **Meet potential donors**, getting to know them and sharing your experience with the organization as their peer.

- The Board member will be asked to **engage with that prospect as a peer** and connect the prospect with the organization.

- Board member may choose **to host a virtual event**. (Parlor Event)
  - Host/Staff can supply the guest list, assist with logistics and arrange to provide a program and presentation by the CEO or key staff.
Solicitors

Work with staff to ensure that prospects are properly approached.

- Meetings, phone calls
- At lower levels, by signing a letter
- Making follow-up phone calls after formal requests have been made by staff or executive leadership
- Personal meetings

Door Opener...ask the Board member to schedule a meeting and accompany the solicitor and/or staff to request a gift
Stewards

Thank donors!!! Thank donors!!! Thank donors!!!

Stewards can be grouped and asked to **thank donors in their specific community.**
Stewards

Staff will give the Board member serving as a Steward names of donors whom the Board member can contact directly to thank.

- By simply calling them to thank them
- Sending a hand-written note
- Taking them to lunch, coffee, or dinner
- Arranging to meet them at the non-profit office or to visit an organizational program
- Offer a tour of the non-profit with staff or the CEO
Self-reflection on the Roles of Fundraising:

- Prospectors
- Cultivators
- Solicitors
- Stewards

How do you see your board fitting into these roles?

Tell Us in the Chat!
Lessons Learned:
Fundraising During COVID-19

Upcoming Webinar:
APRIL 21, 2021
11:00am-12:30pm PST | 2:00pm-3:30pm EST
QUESTIONS?

Send them through the chat!
CONTACT HANNAH:

hannah@thephilanthropycoach.com
THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.