

fundraising academy

CAUSE SELLING EDUCATION



Wednesday, March 17, 2021

Supercharge Your Fundraising Board

Moderated by:



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Fundraising Academy

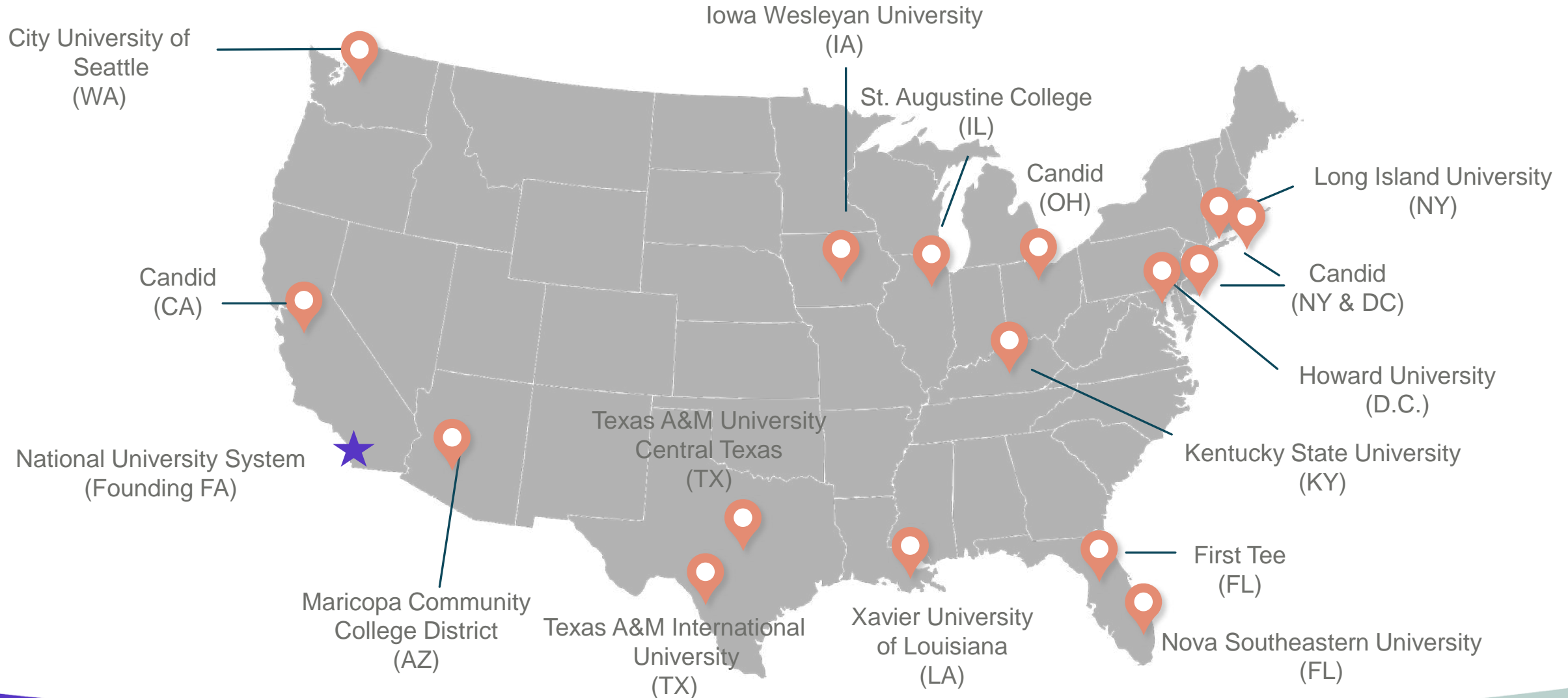


FUNDRAISE

YOU'VE GOT A CAUSE.
LEARN HOW TO FUND IT.



Our Affiliate Partners





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



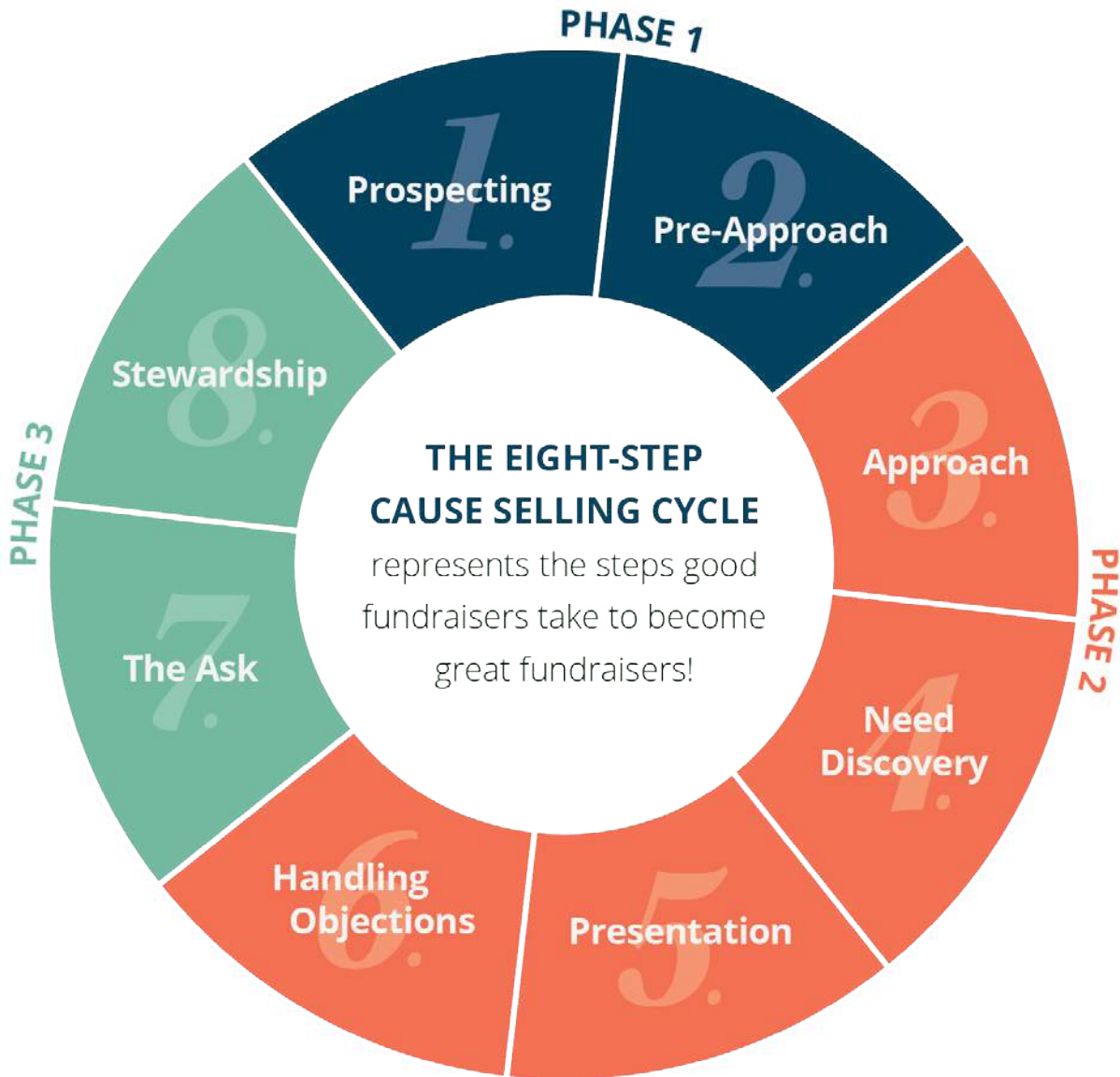
- Techniques for board engagement in fundraising

The Cause Selling Cycle

Phase One

Phase Two

Phase Three



Traditional Fundraising vs. Cause Selling

PHASES	TRADITIONAL MODEL OF "ASKING"	PERCENTAGE OF TIME SPENT IN EACH PHASE
APPROACH	TELLING	10%
IDENTIFYING NEEDS	QUALIFYING	20%
MAKING THE PRESENTATION	PRESENTING FEATURES	30%
RESISTANCE & GAINING COMMITMENT	CLOSING LONG & HARD	40%

PHASES	RELATIONSHIP MODEL OF "ASKING"	PERCENTAGE OF TIME SPENT IN EACH PHASE
APPROACH	BUILDING TRUST (RAPPORT)	40%
IDENTIFYING NEEDS	PROBE, ASK, QUESTION & LISTEN	30%
MAKING THE PRESENTATION	SELL BENEFITS	20%
RESISTANCE & GAINING COMMITMENT	REASSURE "MAKING THE ASK"	10%

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**

10 Board Responsibilities

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!

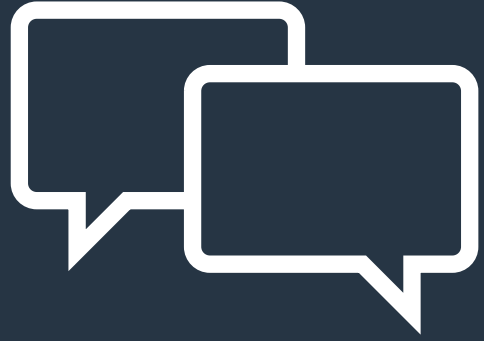
- Establish from the start that fundraising is an **expected activity**.
- Make it clear to the Board that every one of them **is capable of participating** in some aspect of the fundraising process...

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!**



COMMUNITY SHARE

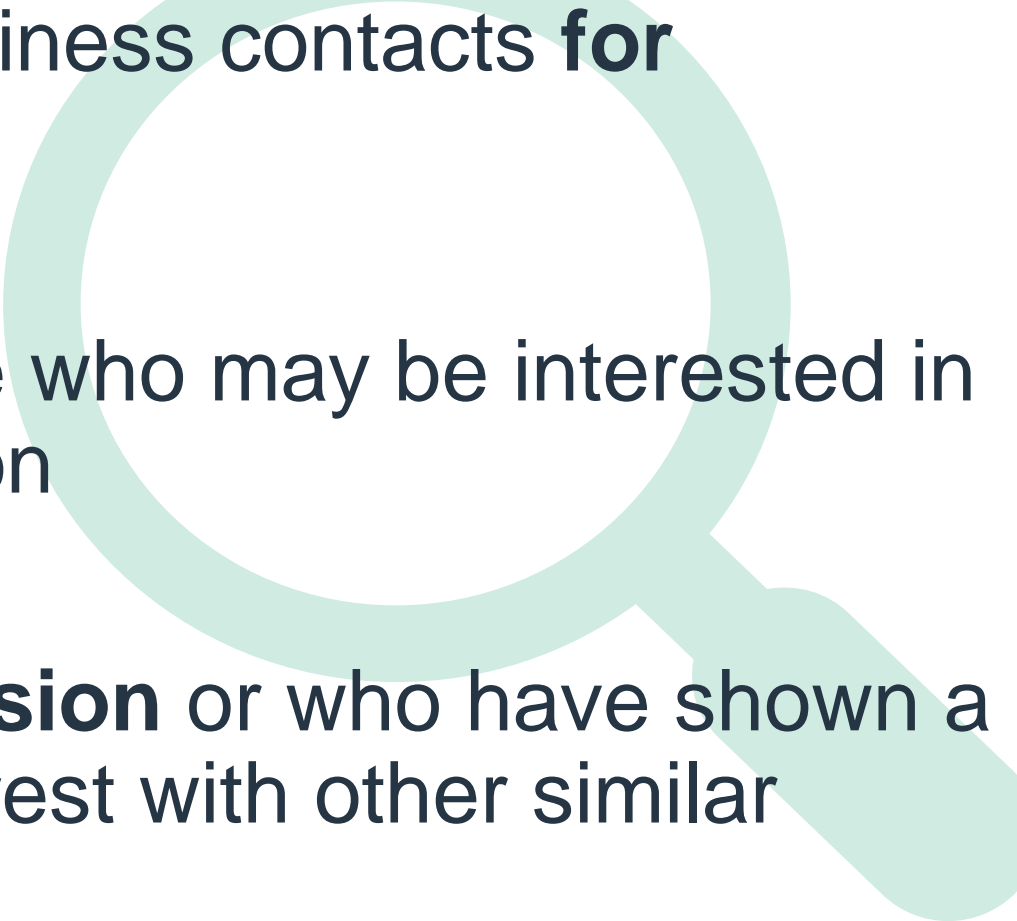
What is the biggest barrier your board must overcome to be successful fundraisers?

Tell Us in the Chat!


Roles in Fundraising



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.
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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!!!

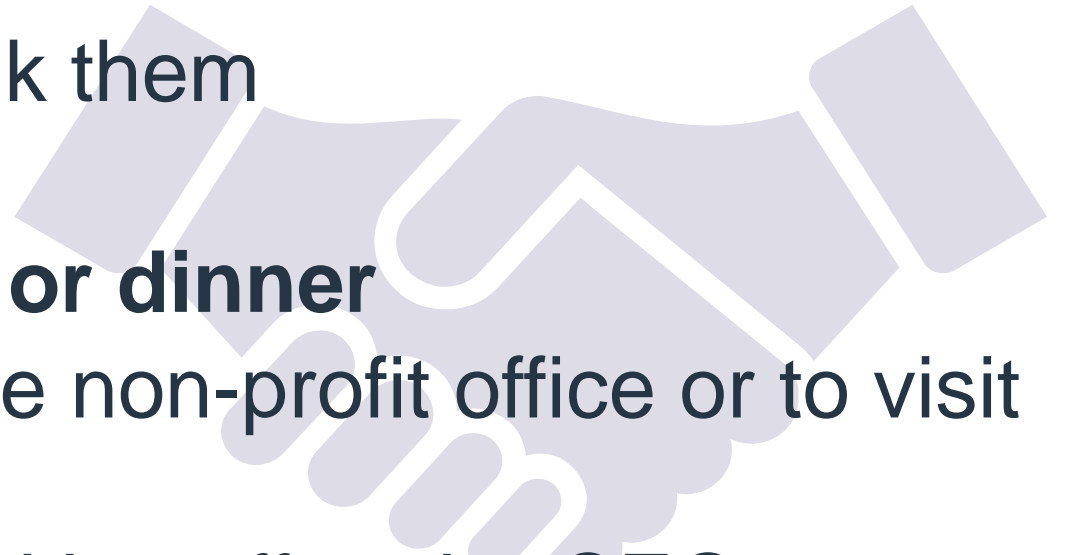
Stewards can be grouped and asked to **thank donors in their specific community.**

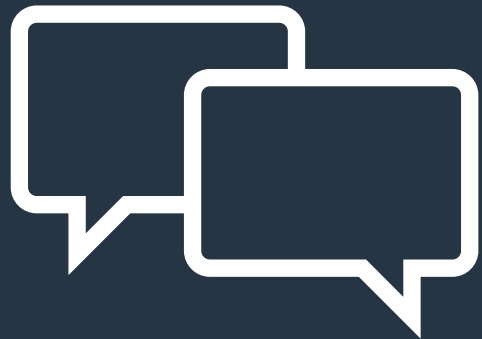


Stewards

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





COMMUNITY SHARE

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!



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REGISTER TODAY

Upcoming Webinar:

APRIL 21, 2021

11:00am-12:30pm PST | 2:00pm-3:30pm EST

Lessons Learned:

Fundraising During COVID-19



QUESTIONS?

Send them through the chat!



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THANK YOU

TAKE YOUR CAUSE AND
CREATE IMPACT.

**fundraising
academy**
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