

Mission Possible: ***How to Engage Your Board in Fundraising***

Presenter: Lori L. Jacobwith
www.LoriJacobwith.com

We'll start today's session at 3 minutes after the hour

Who is Lori?

- 25+ years. Trainer, speaker. communication strategist & fundraising coach
- Measurable: Since 2001 helped organizations raise more than \$150 million and counting.
- Impact: My work creates environments where people find ease in their work with, and their conversations about money.



Where we are heading today



What we will cover

- **What is the difference between fundraising and development?**
- **Who is responsible for development outcomes?**
- **When should the fundraising/development discussion begin with board members?**
- **What are some ways the board can be involved and NOT have to ask for money?**

What we will cover

AND...

- **How to measure & share activity updates that will cause the board to be more interested in helping with fund development?**
- **How to “train” the board to be an asset to your fundraising team?**

How to Engage Your Board



*What are your
biggest
challenges
with your
board?*

The difference between fundraising and development?

Fundraising

The raising of assets and resources from various sources for the support of an organization or a specific project.

~ Source: AFP Fundraising Dictionary,
(Association of Fundraising Professionals)



Development



The total process by which an organization increases public understanding of its mission and acquires financial support for its programs.

*~ Source: AFP Fundraising Dictionary,
(Association of Fundraising Professionals)*

EVERYONE is busy



Board Duties & Responsibilities

- Determine the Organization's Mission and Purpose
- Engage in Strategic Thinking and Planning
- Approve and Monitor the Organization's Work
- **Ensure Adequate Financial Resources**
- Provide Effective Fiscal Oversight
- Ensure Sound Risk Management Policies

Board Duties & Responsibilities

- Select and Support the Chief Executive and Review Their Performance
- Enhance the Organization's Public Image
- Carefully Select and Orient New Board Members and Board Leaders
- Maintain Board Structure and Operations
- Organize & Participate on Committees and Task Forces

The Secret to Raising Money: Use Clear, Bold Communication

- Telling Your Story - *Intro*
- Asking – *Take Action*
- Maximize Relationships
– *Stay Relevant*
- Managing Data

Support of all kinds moves toward boldness & clarity of communication



What People Want

Notice me


Like me

Touch me

Do what I say

Miss me if I'm gone



The background of the slide is a light green color with a pattern of numerous US dollar bills falling from the top. The bills are shown in various orientations and positions, creating a sense of motion and abundance. The bills are semi-transparent, allowing the green background to show through.

***“Feeling good is
what nonprofits
sell.”***

~ Seth Godin, Author & Marketing guru

Storytelling: Primary way of learning



“ *People will forget what you said. People will forget what you did. But people will never forget how you made them feel.* ”

~ Maya Angelo



Who is responsible for development outcomes?

Fundraising



Whose job IS it?

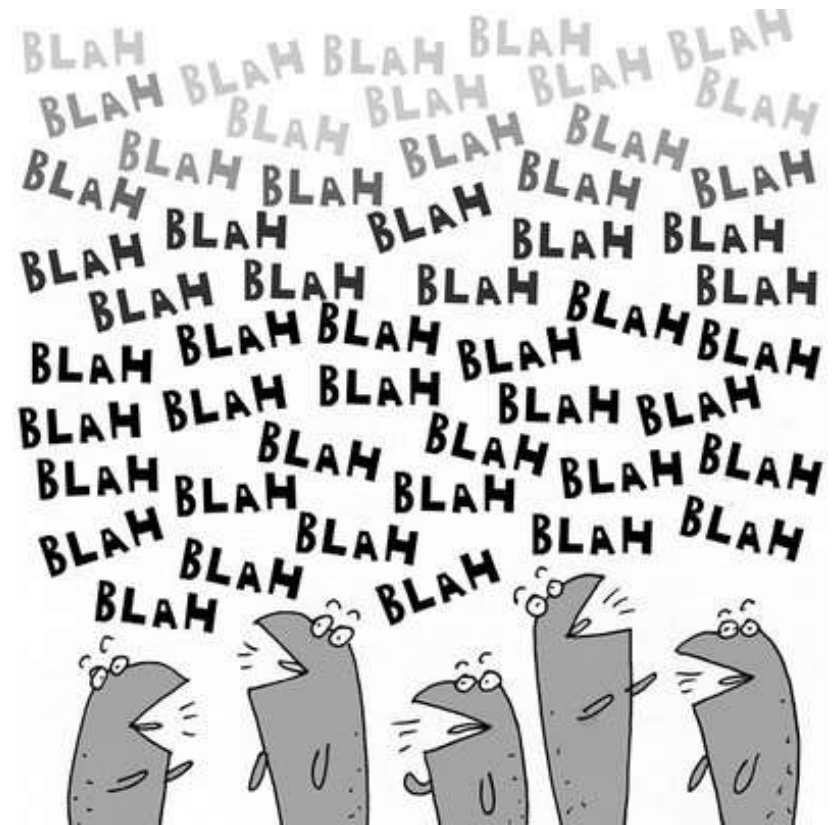
Development is everyone's job



Together
Everyone
Achieves
More

How to Engage Your Board

Secret
Communication
Communication
Communication



Board Communication



1. Includes listening.
2. It's personal.
3. Provides meaningful feedback both ways.

How to Engage Your Board



**Every team must have a team leader
Who is yours?**

A large, semi-transparent image of a hand holding a stack of papers serves as the background for the text.

When should the fund development discussion begin with board members?

Board: Identify & Recruit



- Know what you are looking for
- Set expectations early

Identify & Recruit

[illegible]

Identify & Recruit

Board Application Form

1. Candidate Name _____

Mailing Address _____

City _____ State _____ Zip _____

Home Phone _____ Work Phone _____ Email _____

2. Current position and employer: _____

3. Relevant Experience and/or Employment. Please attach resume.

4. Please circle area(s) of expertise/contribution you feel you can make to further our mission:

Fundraising	Policy Development	Public Policy Advocacy	Evaluation
Special Events	Strategic Planning	Public Relations/Marketing	Technology

How to Engage Your Board



WHAT exactly do you want them
to do in their board capacity?
Provide clear direction.

Ongoing Board Effectiveness

[Your org name here]
Board of Directors

"20__ Menu of Opportunities"
This is an "all-you-can-eat" menu!
Please circle as many items as you like—but at least one per category.

NAME: _____

Appetizers

Provide names of donor prospects
Attend, mingle with & learn something about donors at _____
Invite donors to attend _____
Sign & personalize letters to current and prospective donors
Attend and mingle with donors at a House Party
Help to develop a plan to solicit major gifts
Advocate for _____ and serve as an enthusiastic community relations representative (be an ambassador)
Write a newsletter article

Entrées

Make a significant gift
Include _____ in your estate plan
Host a House Party
Accompany staff on visit to major donor
Make thank you calls to donors
Recruit Annual Reception sponsors
Recruit new board members with capacity and connections

Desserts

Help gain access to corporate sponsors
Promote and attend Lobby Day
Collect other organizations' annual reports, donor lists & programs
Promote and attend Annual Reception, mingle with donors & learn something new about at least 2 donors. Report back to staff.
Acquire or donate silent auction item donations for Annual Reception
Forward emails and newsclips featuring _____ to current and prospective donors

Board Communication

Total Progress to Annual Goal



FY2011

FY year-end August 31, 2011

Funding gap to breaking even: \$20,113

Event info:

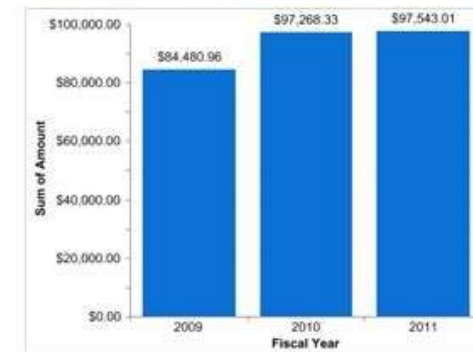
August 10 Under the Hood Attendance: 16 (4)

Annual Event Registrants: 15/2

Individual Donations by Month –



Individual Donations Over Last Three Years



What information do you share to allow board members to shine?

How to Engage Your Board



Be clear about all duties & responsibilities, especially if they include helping with development activities.

Reward them for helping!

A collage of images related to documentary filmmaking. The central focus is the word "IMPACT" in large, white, bold, sans-serif capital letters. The background is a collage of various scenes: top left shows two women in a workshop; top center features a man in a hat and a woman looking at a screen; top right shows a basketball hoop and a person on a street; middle right shows a man with a large video camera; bottom left shows a crowd of people; bottom center shows two men in a field; bottom right shows a man in a vehicle. A logo for "KARTEMQUIN FILMS" is visible in the upper center.

And what does it cost, per person, per week, per ?? to achieve that impact?

Why you raise money



Communication



The most taken for granted & important component of development.



Ringling the Bell: Smith Family Foundation Pledges \$500,000 to Health Center

We are thrilled to announce that the **Richard and Susan Smith Family Foundation***, located in Chestnut Hill, MA, has **pledged \$500,000** to help build a new community health center for Lowell. **This gift represents the single largest campaign contribution to date.**

Treat them as insiders. Share timely news.
Both good and not so good.

How to Engage Your Board



What's missing in your current communication with your board?

- What do you want them to do more of?

How to Engage Your Board

What would a successful and fully engaged board look like?



How to Engage Your Board

Your Communication

You have a rare opportunity to empower board members to **feel like super heroes.**

To cause a connection that deeply aligns with their highest ideals and values.



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“Thank and Release”

Annual Elections

Term Limits Are Your Friend

On the board v. On Board

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100%

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"Accountability is being held responsible for one's actions..."



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*“Responsibility implies there is a consequence, that is, **a reward** for meeting obligations and absence of reward for failing to meet them.”*

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“Accountability works because people care about the outcome, and they want others to know they are reliable.”


~ Source: London, M., & London, M. (2007). First-time leaders of small groups: how to create high-performing committees, task forces, clubs, and boards. San Francisco: John Wiley & Sons.

How to Engage Your Board

Four necessary ingredients for holding people accountable:

1. Establishing clear expectations;
2. Preparing people to meet those expectations with needed training and support;
3. Monitoring performance, and
4. Attaching consequences to the results

~ Source: London, M., & London, M. (2007). First-time leaders of small groups: how to create high-performing committees, task forces, clubs, and boards. San Francisco: John Wiley & Sons



What are some ways the board can be involved and NOT have to ask for money?

Ways to be involved in Development

Make a personal gift.



Ways to be involved in Development



Invite others TO GIVE
time, talent, stuff or \$.

Ways to be involved in Development

Invite people INTO the organization:
Act as “ambassador”
and advocate.



Ways to be involved in Development

Thank recent
happy donors.



Ways to be involved in Development




Participate actively in some aspect of raising awareness & sharing how money makes an impact.

Ways to be involved in Development



Hold each other accountable.

A background image showing a pair of hands holding a clipboard with papers. The image is faded and serves as a backdrop for the text.

**How to measure & share
activity updates that will
cause the board to be more
interested in helping with
fund development?**

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Measuring Success

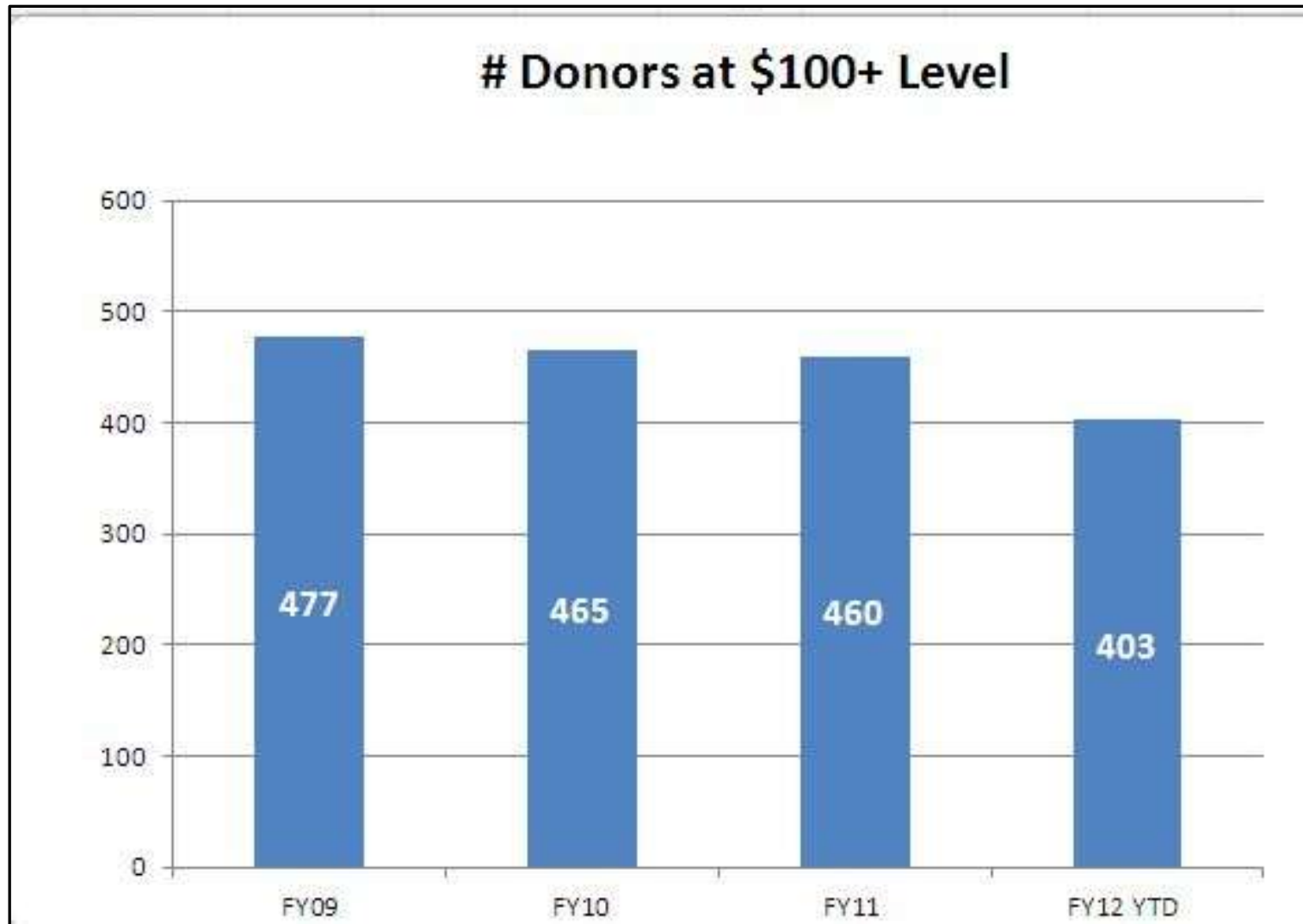
Together: clarify and commit to the duties & responsibilities of the board especially in development.

- Identify measures of success for the board.
- Identify who, on the board is your partner to ensure expectations are met.
- Utilize a dashboard to show activity and hold people accountable.

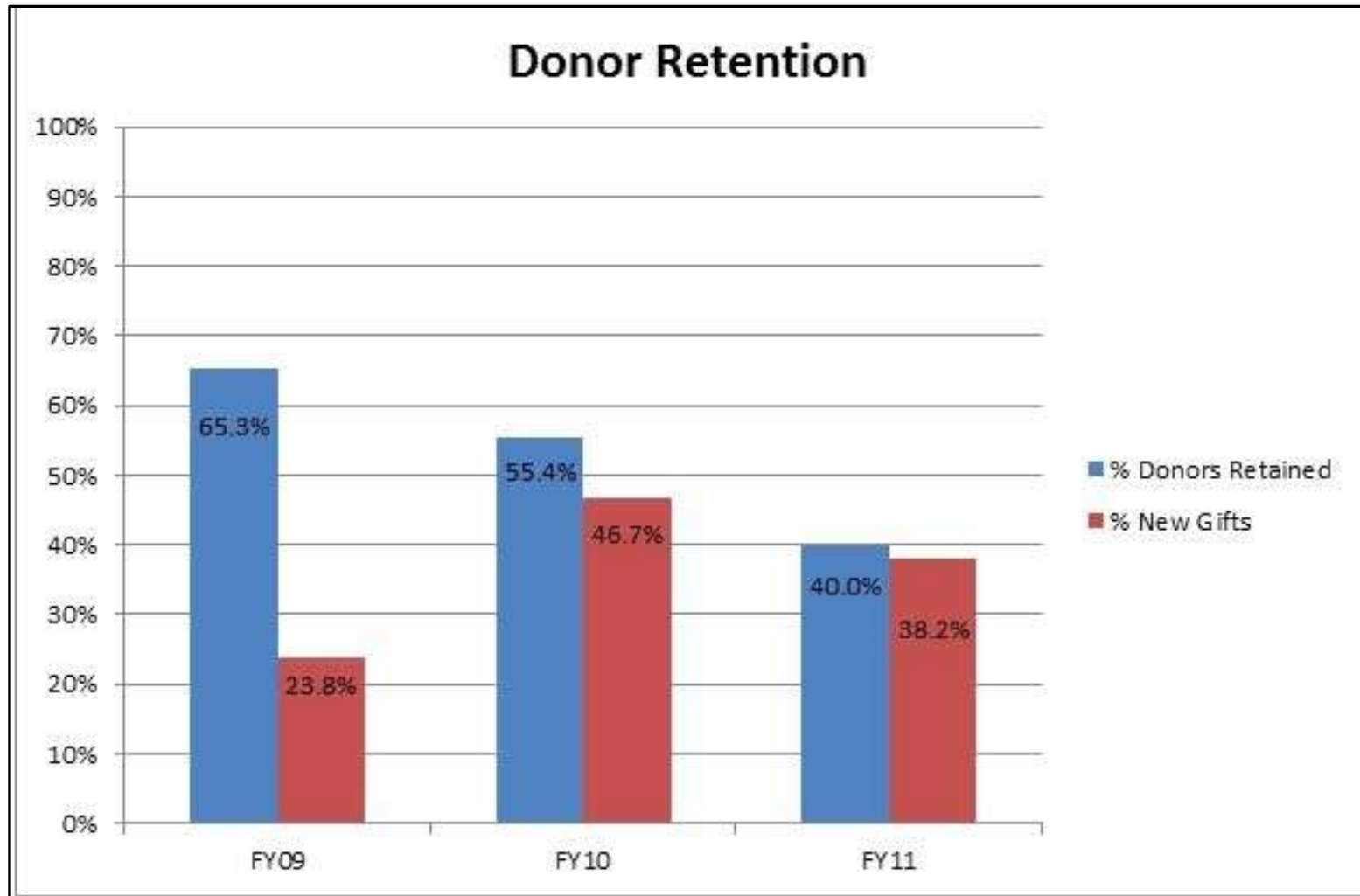
Measure Your Activity



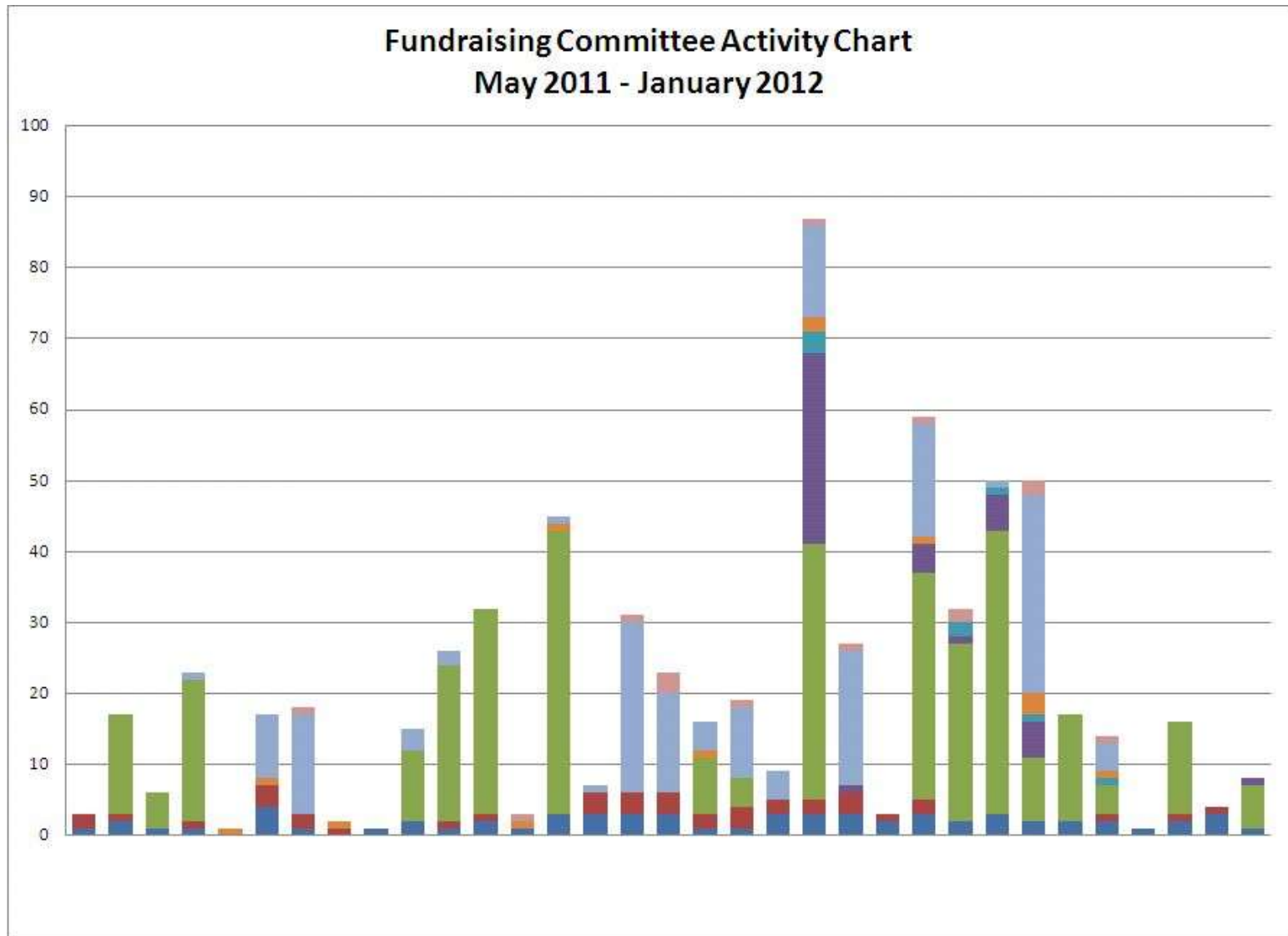
Measure Your Activity



Measure Your Activity



Measure Their Activity



Measure Your Activity

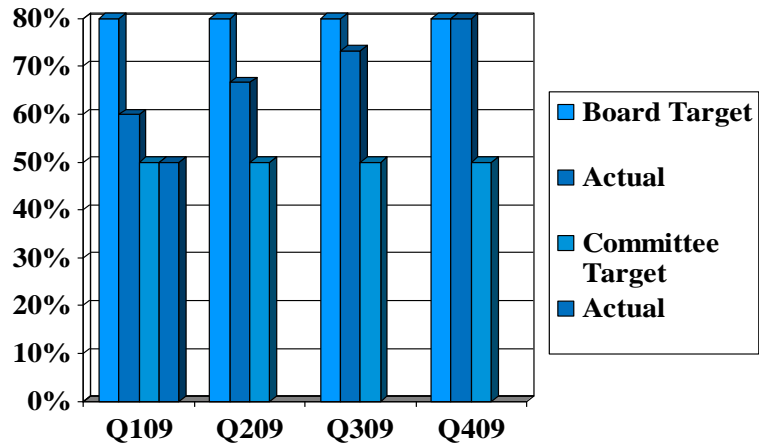
Other things to measure:

- # of one-on-one visits
- # of asks
- # of thank you calls v. # of gifts
- # of times gap message is shared
- What else?

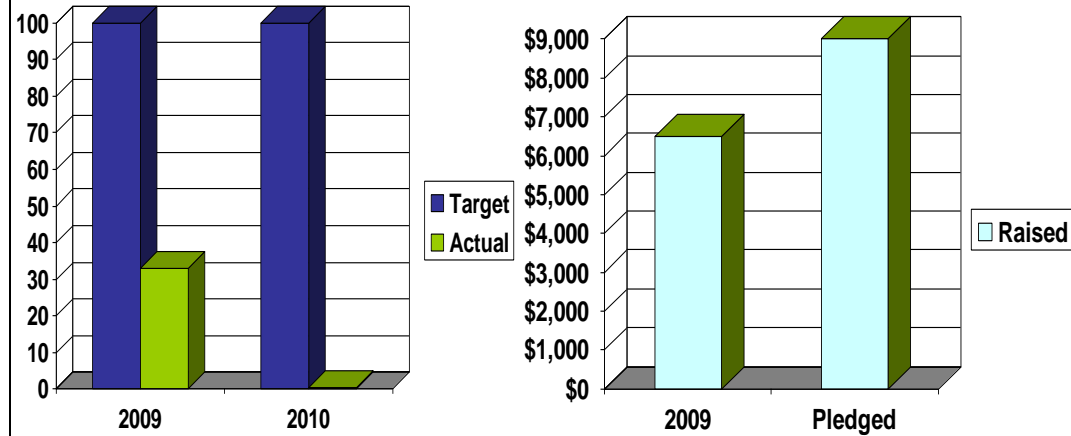
Your Organization Name Here

Governance Scorecard

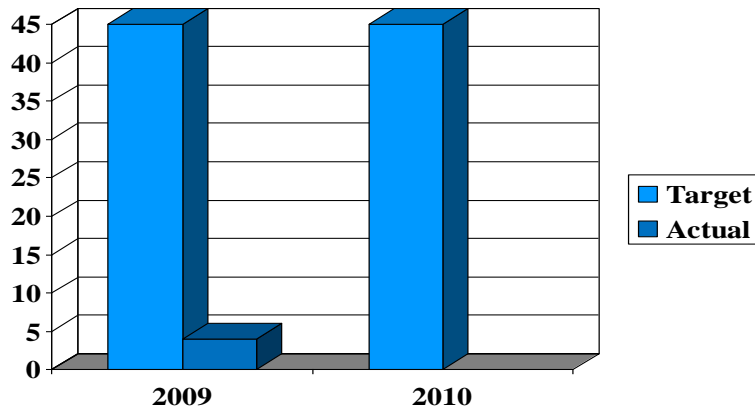
Full Board and Committee Participation



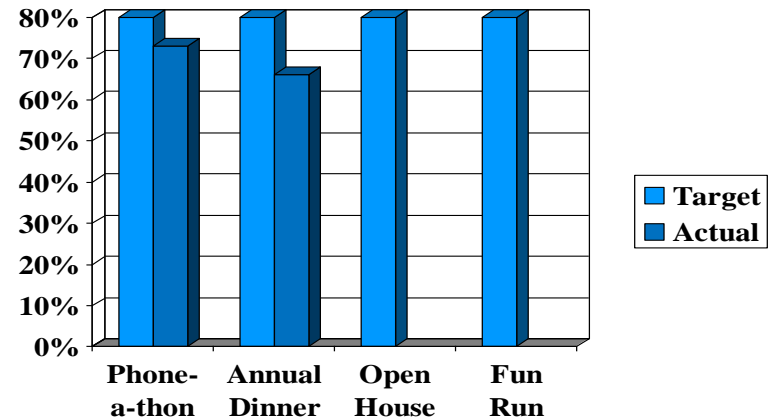
Board Donor Contact and Financial Support



Visibility Building Participation



Board Member Annual Event Participation



How to Engage Your Board

**Powerful
contributions are
made when:**

People are in touch with
their purpose, their vision,
and with the difference
they make.

~ Lynne Twist: Fundraising From the Heart



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How to Engage Your Board

The board signs an annual board agreement that clearly spells out what the expectations are for participation other than attending meetings.



YES or NO

How to Engage Your Board

**Our board knows they are
expected to assist with
development efforts in some way.**

YES or NO



How to Engage Your Board

Our board conducts an annual self assessment.

YES or NO



How to Engage Your Board

I am certain our staff *(if we have staff)* provides the board with data & support to powerfully assist with fund development.

YES or NO



How to Engage Your Board

100% of our board makes an annual financial gift.

YES or NO



How to “train” the board to be an asset to your fundraising team?

Board Orientation



Current process vs. Future process

Board Orientation – Use checklist

Four key areas to focus on:

- ☐ Special meeting for new Board members
- ☐ Orientation packet
- ☐ Personal phone call or meeting with an experienced board member
- ☐ Follow-up personal contact after first three months of board service

Source: Technical Assistance for Community Services, 2004

Sample board job description

Adapted from *Great Boards for Small Groups*
by Andy Robinson, Emerson and Church, 2006

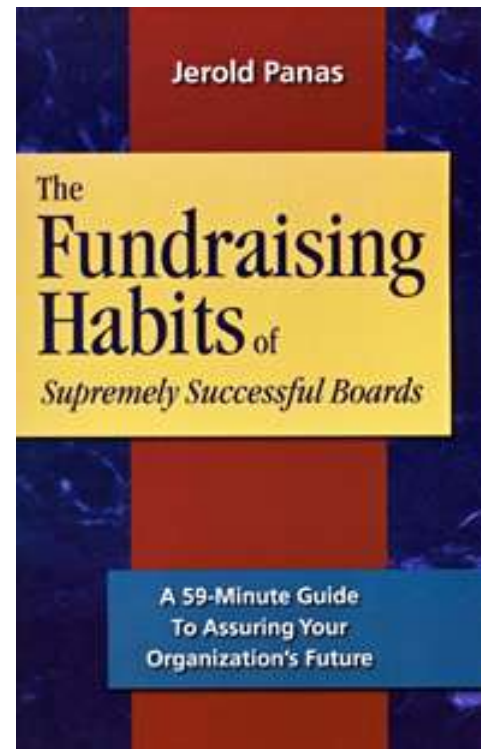
What board members provide	What board members can expect in return
1. I will give my best effort to "hit the ground running" when beginning my service with the board.	1. The organization will provide me with a full orientation, including background information on work accomplished to date.
2. I will learn about the organization's mission and programs, and be able to describe them accurately.	2. The organization will provide me with relevant materials and education.
3. I understand that the board meets ___ times per year, plus one annual full-day retreat. I will do my best to attend each meeting, with the understanding that three consecutive unexcused absences will be considered resignation from the board.	3. I expect that board meetings will be well run and productive, with a focus on decision-making and not merely reporting. I understand that agendas will be distributed at least one week in advance. If I wish to add items to the agenda, I will contact the chair at least two weeks in advance.
4. I accept fiduciary responsibility for the organization and will oversee its financial health and integrity.	4. I expect timely, accurate, and complete financial statements to be distributed at least quarterly, one week in advance of the relevant board meeting. I also expect to be trained to read and interpret these financial statements.
5. I will provide oversight to ensure that our programs run effectively.	5. I expect monthly reports from the executive director, program updates, press clippings, etc.
6. I accept ethical responsibility and will help to hold fellow board members and the executive director (and, by extension, the full staff) to professional standards.	6. The organization will provide me with relevant training.
7. I will serve as an ambassador to the community to educate others and promote our work.	7. I will need materials and may need training (public speaking, etc.) to do this job effectively.
8. I commit to increasing my skills as a board member.	8. The organization will provide me with appropriate training and support.
9. I will participate in fundraising to ensure that our organization has the resources it needs to meet its mission. I commit to making a personal donation; our organization will be one of the top three charities I support each year that I am on the board.	9. I will be able to choose from a range of fundraising activities, and I expect relevant training and support to help me fulfill my obligations. I will have the option of fulfilling my personal pledge in monthly or quarterly installments, if I so choose.
10. I will evaluate the performance of the executive director.	10. This evaluation will be based on goals developed jointly by the board and the E.D.

How to Engage Your Board

Provide board members with tools and information to do their job with ease.



“ *A roaring advocate: You’re passionate about your organization...and willing to show it.* ” ~ Jerold Panas



Fundraising is deep, profound relatedness

~ Lynne Twist, *The Soul of Money*



Resources



Listen: My Perspective on Board Recruitment & Retention

<http://tinyurl.com/7uurtub>

Six Steps to Exceptional Nonprofit Boards

<http://tinyurl.com/6tfzftk>

10 Stop Signs on the road to Board Recruitment

<http://tinyurl.com/5amwtx>

Little things add up to something big

Ensure engagement by paying attention to details

<http://tinyurl.com/7qr5t24>

Enlist Your Dream Board by Gail Perry

<http://tinyurl.com/7xu6z9r>

Questions?



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