Slide 1

# WORDS TO ACTION

Board Engagement in Fundraising

Slide 2

## The Board's Governance Role in Fundraising

- Define/clarify mission.
- Ensure development plan.
- Create fundraising and donor recognition policies.
- Ensure fundraising methods adhere to ethical standards.
- Promote positive image.
- Monitor progress and evaluate outcomes.

Slide 3

## Individual Board Member Responsibilities

- Make a meaningful contribution
- Identify, evaluate and cultivate prospects
- Make introductions
- Organize and attend special events
- Attend face-to-face solicitations
- Write or sign appeal letters
- Thank donors

Slide 4

## Chief Executive's Role in Fundraising

- Help identify prospects.
- Serve as the organization's representative to potential funders and the community .
- Serve as a contact for donors.
- Ensure compliance with funding sources and regulatory requirements.
- Hire and supervise fundraising staff.
- Initiate and assist the board in developing fundraising policy.
- Help the board set fundraising priorities.
- Manage the acknowledgement process.

Slide 5

## The Development Committee

- Leads the board participation in fundraising.
- Works with the staff to develop a fundraising plan.
- Develops board fundraising policies, plans and procedures for board approval
- Ensures the case is strong and based on the organization's mission.
- Leads the boards efforts in identifying, cultivating and approaching major donors.

Slide 6

## The Board's Fundraising Culture

- Do you have a culture that encourages board members to accept fundraising as a board responsibility? Complete Board Fundraising Culture Assessment.
- Change can be difficult.
  - *Strong leadership from the board chair*
  - *Commitment at the board level to the process and goals of change*
  - *Willingness at the individual level to participate in change.*

Slide 7

## Why 100% Board Giving?

- Demonstrates personal commitment.
- Gives board members confidence to ask others to give.
- Encourages other funders to give.
- Creates board member "ownership".

Slide 8

## Basic Principles of Philanthropic Giving

- People give money because they want to.
- People don't give unless they are asked.
- People give money to people.
- People give money to opportunities, not to needs.
- People give to success, not to distress.
- People give money to make a change for the good.

Slide 9

## Stages of Fundraising

Slide 10

## Stage One: Cultivation

- Building relationships with prospects
- Generating interest in the organization.
- Showing prospects what the organization is all about – history, programs, finances, etc.
- Sometimes called "friend raising"

Slide 11

## Elevator Speech

- A short description of your agency that grabs attention
- Says a lot in just a few words.
- Tells your core message
- Stimulates interest in wanting to know more.

Slide 12

## Board Member Involvement in Cultivation.

- Provide names and addresses of donor prospects for the mailing list.
- Research phone numbers or secure exact addresses for campaign mailings.
- Recruit volunteers and prospective helpers
- Advocate for the organization as an enthusiastic community relations representative.
- Facilitate introductions and access to individuals or groups where you have credibility and influence.
- Hand deliver invitations or promotional material.
- Join the speakers bureau.

Slide 13

## Solicitation

- Why do donors give?
- Common responses to being asked to Ask
- What makes an Ask successful?

Slide 14

## Case Statement

- Sets out the compelling reason why prospective supporters should make a contribution.
- Focuses on results, not organizational needs.
- Includes clear, essential facts.
- Includes the four elements:
  - *Why*
  - *What*
  - *How*
  - *Who*

Slide 15

## Board Member Involvement in Solicitation

- Contact local businesses to seek an in-kind donation.
- Ask contacts to participate in the online giving days.
- Personalize annual solicitation.
- Increase your donation each year.
- Request a pledge or contribution from lapsed donors.
- Solicit a cash contribution from a service club, civic group or church/temple.
- Ask selected individuals for a specific gift or multiyear pledge.

Slide 16

## Most Effective Ways to Solicit Support

- Personal – face to face
- Personal letter on personal stationary
- Personal telephone call
- Personalized letter
- Direct mail
- Phone-a-thon
- Special event
- Door to door
- Media advertising

Slide 17

## Stewardship

- Thanking donors and letting them know the difference their gift made.
- Maintaining donor relationships
  - *Thank you letters and phone calls*
  - *Donor recognition opportunities*
  - *Invitations to special events*
  - *Updates from the organization – how their donation is making a difference*
- Evaluate!

Slide 18

## Board Member Involvement in Stewardship.

- Participate in a "Thank-A-Thon"
- Send a personalized individual thank you note to donors
- Maintain relationship with donors
- Look for ways to keep donors connected to the organization

Slide 19

## Help Board Members Find Their Comfort Level

Planning and Building

↓

Friend Raising

↓

Solicitation

Slide 20

## Fundraising Secrets of Success

- To succeed in fundraising, you must know four things:
  - *The mission of the organization*
  - *The goals of the organization*
  - *How to ask*
  - *How to overcome fears*
- If you don't ask, you won't receive
  - *The only way to fail is to not try*

Slide 21

## Questions?

Colleen Campbell Bozard
ccbozard consulting
(803) 782-7087
ccbozard@sc.rr.ccom
www.ccbozardconsulting.com