

onecause[®]
POWERFUL FUNDRAISING SOLUTIONS


Windmill Hill
CONSULTING LLC
BUILDING NONPROFIT EXCELLENCE
THROUGH EFFECTIVE FUNDRAISING

3 REASONS

Why Your Board Doesn't

Fundraise

and How to Fix That

WED, AUG 21 | 1PM ET | 12PM CT | 10AM PT



onecause®

POWERFUL FUNDRAISING SOLUTIONS



1.5 Billion Raised



1.5 Donors
Engaged Annually



15,000+
Fundraisers

Nice to Meet You

- 25+ year career as a fundraiser, earning my stripes at big shops like Harvard, American Red Cross, National Trust for Historic Preservation
- CFRE, AFP Master Trainer, Pres-elect, AFP Washington Area Metro Chapter, Advisory Panel, Rogare, The Fundraising Think Tank
- Tailored 1:1 consulting on annual funds, major gifts, campaigns, assessments/studies, CEO/CDO coaching, and board training.



What We'll Learn Today...



Three common
complaints
about boards
and fundraising



Good
governance
practices to
ensure your
board is set up
for success



Solutions that can
turn around your
board into
fundraising
superstars...
especially at year-
end

It comes down to:



- Do you have the ***right people*** on your board?
- Do they know what you'd like them to do to ***help with fundraising?***
- Do they have the ***training and tools*** they need to be successful?

1

My board
isn't
made up
of the
right
people.

PLANET 501C3 TALES FROM THE NONPROFIT GALAXY BY MIRIAM ENGELBERG

FAIRY TALES FOR BOARD MEMBERS



© 2/27/03 COMPASS POINT

WWW.PLANET501C3.ORG

POLL

How many of you can relate to this complaint?



You're not alone...

	Area of Board Performance	Average Grade from Executives
Strength	Understanding mission	A
	Financial oversight	

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	Area of Board Performance	Average Grade from Executives
Strength	Understanding mission	A
	Financial oversight	
Performance	Legal & ethical oversight	B
	Guiding & supporting the chief executive	
	Understanding board roles & responsibilities	
	Thinking strategically as a board	
	Adopting & following a strategic plan	
	Evaluating the chief executive	
	Monitoring performance against strategic plan	

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Challenge Areas	Community-building & outreach	C / Improved from an F
	Monitoring legislative & regulatory issues	
	Increasing board diversity	
	Fundraising	

“ Get the right people on the bus,
the wrong people off the bus,
and the right people in the right seats.”

—Jim Collins, *Good to Great*

Who do you have now? Who will you need?

Area of Expertise/Leadership	# of Current Members	# of Prospective Members
Administration / Management		
Early-Stage Organizations / Start-ups		
Financial Oversight		
Fundraising		
Government		
Investment Management		
Law		
Leadership Skills / Motivation		
Marketing / Public Relations		
Human Resources		
Strategic Planning		
Technology		
Other		

Define Your Short-term and Long-term Needs



- ✓ Create a matrix that maps skills, networks, geography, demographics you currently have and what you may need to fill
- ✓ Identify your current gaps through an annual Board self-evaluation to gauge performance
- ✓ Work with Governance or Executive Committee to lead this ongoing process and set or adjust expectations

Your Ideal Potential Board Members Have...



Access

- Does this person have a relationship to you or other board members, staff, donors, others related to you?

Belief

- Does this person genuinely care about your mission?
- Is this person historically philanthropic toward similar causes?

Capacity

- Does this person have the financial ability and/or networks of those who can support you at a significant level?

Development Committee?

Option 1

All Board Members

- Subcommittee of those who are really “excited” to fundraise
- Run the risk of burnout, competition with other board responsibilities, not the right members

Option 2

Blended Membership

- Some board but also include non-board
- This helps you
 - test prospective board members,
 - involve those with capacity but not the time for board
 - keep influential & effective past board members involved

Option 3

No Development Committee

- Not ideal
- In this case, the development director or executive director will need to drive fundraising strategies and priorities for the board
- Work with board leadership to identify the next committee leader from the current slate of board members, major prospects, or donors you’d like to become more involved.

2

My board isn't
a
*fundraising
board.*

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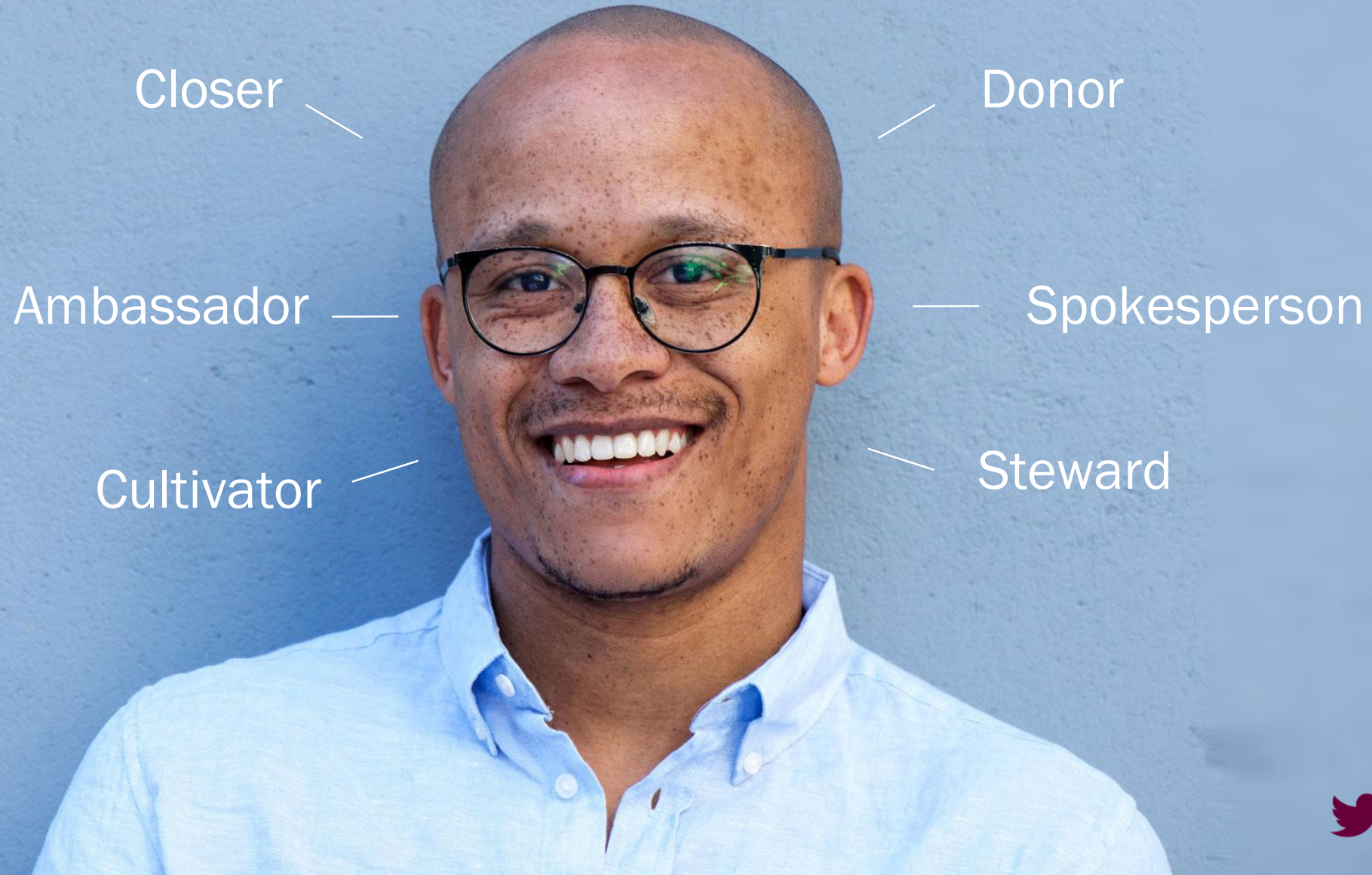
“Now let’s talk about money. Do we have any? How much would we like? Does anyone know where we can get some?”

POLL

How many of you can relate to this complaint?



Fundraising Isn't Just Asking For Money



Boards Lead a Culture of Giving



Source: "Major Gift Fundraising: Unlocking the Potential for Smaller Nonprofits," Amy Eisenstein and Adrian Sargeant, 2015

I can't picture in my mind a major gifts circle without the board being at the center of that. That culture just kind of permeates, emanates out from that circle. They're right there in the heart of it because they helped grow that culture...There's a hunger and experience of our mission, of our integrity, of our welcome, of our gratitude.

—Board member

Give or Get? Give AND Get?



“You can't be a conscientious objector to our campaign — you've got to make your calls.”

Here's Why Board Giving Matters

1

Board member giving is a public commitment to the organization's work

2

Board members might pay increased attention to the nonprofit's mission and financial health when their own money is engaged

3

Many other donors and institutional funders will not give to organizations that don't have 100 percent board participation as current donors.

Agree to a Role for Each Board Member

- ☐ Offering names of personal/business contacts which are moved to prospects lists and into active cultivation
- ☐ Reviewing donor lists from other organizations and identifying potential supporters and/or “rating” current donors
- ☐ Augmenting information on current donors (i.e., who should contact, qualifying info)
- ☐ Making the initial contact with a donor or prospect to move towards further cultivation
- ☐ Being the primary member of a team making asks
- ☐ Writing personal, hand-written thank you notes to donors
- ☐ Making calls to donors, e.g. thank you calls, outreach to lapsed donors, calls to current for renewed contributions this year.
- ☐ Taking responsibility for personally cultivating or stewarding donors/guests at a special event
- ☐ Hosting a small event that introduces new networks to your organization
- ☐ Contributing to fundraising events: raising money, acquiring in-kind services/items, volunteering time
- ☐ Participating in training: during meeting, offsite, other

Boards Influence Donor Retention

93%

They would “definitely or probably give again the next time they were asked”

84%

They would “make a larger gift.”

74%

They would “continue giving indefinitely”

3

My board
doesn't seem to
follow-through.



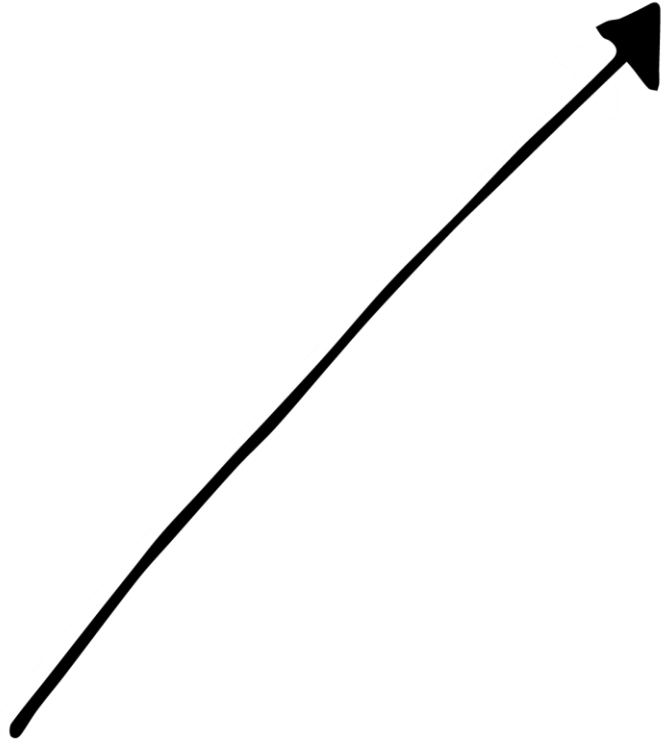
POLL

How many of you can relate to this complaint?

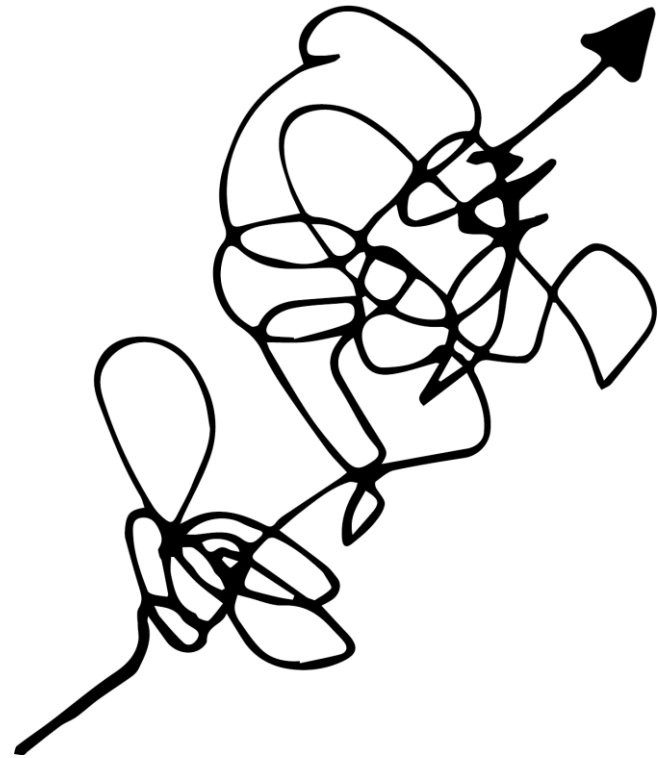


Do They Know What You'd Like Them To Do?

Expectations



Reality



Set Expectations from the Beginning

1

Job Description

- Your expectations (time, meetings, financial)
- How they can be involved in fundraising

2

Getting to Know You

- Mission and Vision
- Strategic Plan
- Your goals and challenges
- Their role and responsibilities

3

Fundraising 101

- Your fundraising trends
- Opportunities and challenges
- Ways they can “fundraise”
- Tips on how to be successful



POLL

What other ways have you found helped your boards to fundraise?



What's Holding Your Board Back?

Inspire them

- Use a mission moment at the beginning of every board meeting
- Connect them with donors—thank you calls & notes at every meeting
- Bring beneficiaries to tell their stories

Lead them

- Orientation and training sets expectations
- Give them tools and resources they need
- Follow-up with them

Fear of Rejection

- Role play
- Discuss scenarios and responses

Showing Boards Fundraising is More Than Funds Raised

Reporting to the Board

- We want to shift focus from “transactional” to “relationship” fundraising.
- In addition to money raised, share metrics that point to donor engagement (average gift, donor retention rates, e.g.)
- Board Giving/Fundraising Activity—their example matters

How Are We Doing?



Board Self-Evaluation

- Once a year survey the Board to learn how they feel they're doing in their full scope of governance duties.
- Also ask if the staff are supporting the Board in a way that encourages their involvement.

Do Your Expectations Align?

- Understand your board members interests/hesitations/limitations about fundraising.
- Share the Board Self-Assessment to ensure that it aligns with their expectations.
- Ask them the support they will need and ways they want you to hold them accountable.
- Quarterly “report card”
- In-person check-in meetings
- Other?

When Do You “Bless and Release?”

Annual Self-Evaluation

- Are we honestly assessing how we’re doing as a leadership group and as individual members?

Term Limits — YES!

- Can help you avoid burnout
- Without them, limits your access to networks
- Otherwise, there’s no easy way to remove ineffective members

Bless and Release

- Self-evaluation is a good conversation opener
- Review Board expectations
- Set personal meeting to learn what’s preventing them from fully embracing their duties.
- Thank them for their service

Bonus

My board *can* help
with year-end
fundraising.



There's a Role For *Every* Member

Leading By Example

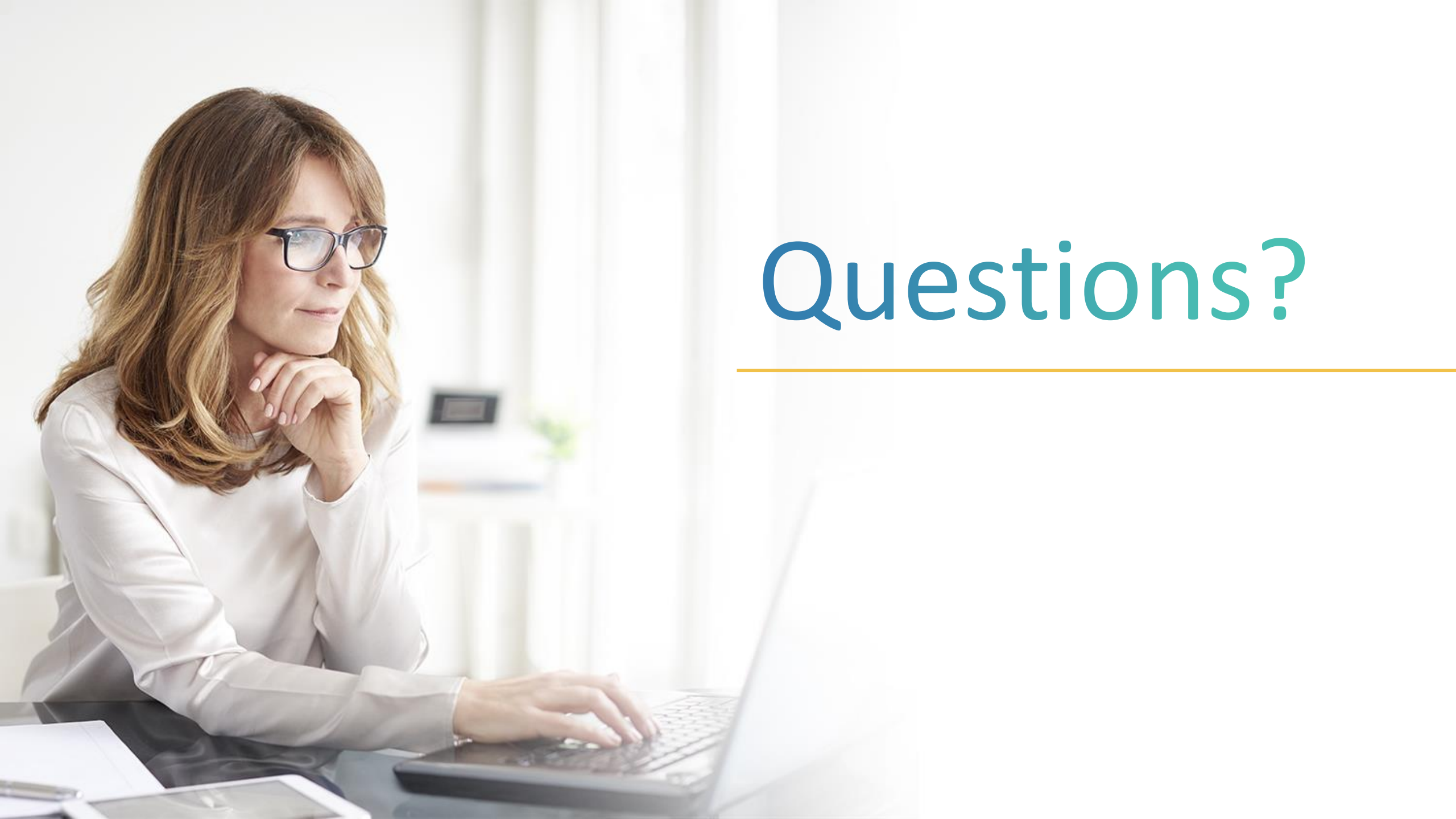
- ☒ Has every board member made their own gift? What's their progress against a board giving goal?
- ☒ Collectively issue a matching or challenge grant

Inspiring Others

- ☒ Hand-write notes on appeal letters—especially to current donors who haven't made their gift yet this year
- ☒ Join staff on 1:1 visits
- ☒ Follow-up calls after solicitation letters have been mailed
- ☒ Invite their networks/Social Media Outreach

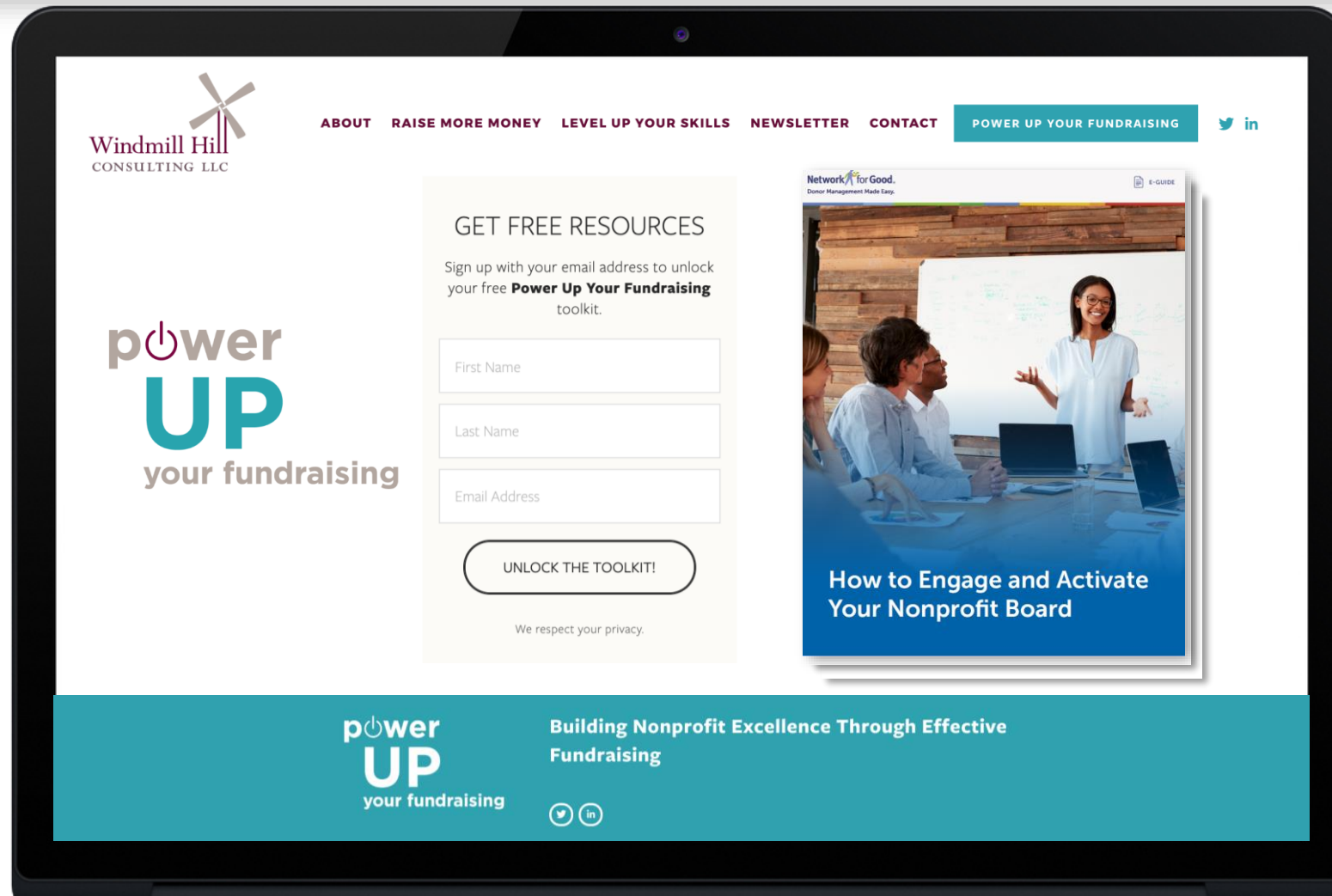
Showing Gratitude

- ☒ Thank you notes and phone calls!!!



Questions?

www.whillconsulting.com



LET'S STAY CONNECTED

Want to chat further?

Email me boreilly@whillconsulting.com

Interested in more resources?

www.whillconsulting.com/power-up-your-fundraising

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