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W E B I N A R



5 Ways **Board Members** Can **Elevate** Your Next **Fundraising Event**



Jeff Middlesworth
CEO
Boardable

WEDNESDAY, JULY 30, 2025



Let's Get Started!

In one word, how would you describe your board's involvement in your fundraising events?



Beyond ^{the} Webinar



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Meet Jeff Middlesworth

Jeff Middlesworth is an experienced SaaS executive and product leader with a track record of delivering innovative solutions that drive customer success.

As CEO of Boardable, he leads the charge in transforming board management and meeting efficiency. Previously, he held leadership roles at ExactTarget, Salesforce, Branding Brand, and Emma.

Jeff has been a keynote speaker at industry-leading events, including ExactTarget's Connections, Salesforce's Dreamforce, and Emma's Marketing United, and has contributed thought leadership on virtual and hybrid board meetings for publications like MeetingsNet and NonProfit PRO.

His passion lies at the intersection of technology, customer experience, and organizational impact.



Jeff Middlesworth

Chief Executive Officer





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5 Ways Board Members Can Elevate Your Next Fundraising Event

Unlocking board engagement to
maximize impact and revenue



Session Roadmap

- The Role of Board Members in Fundraising Events
- Practical Ways to Engage Board Members
- Real-World Case Study & Actionable Template



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The Power of Board Engagement in Fundraising

How confident are you that every board member understands their governance role in fundraising?

- A. Very Confident
- B. Somewhat Confident
- C. Not Confident
- D. Unsure

56% of nonprofits don't have
a donor engagement strategy.

41% of nonprofits didn't have
every board member pledge or
give a gift in the past year.



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The Cost of Disengaged Boards

Overcoming Common Challenges

Challenge

Board reluctance to fundraise?

Lack of time?

No accountability?

Solution

Train them & provide easy-to-use scripts

Assign small, manageable tasks

Set clear expectations and track progress



Tip: Create and implement a board fundraising commitment plan.

What happens when boards aren't engaged?

- 1 Lower donor retention
- 2 Missed sponsorship opportunities
- 3 Reduced attendance and giving at events

Where does board fundraising breakdown?

- A **Expectations are vague—we haven't set dollar or activity targets**
- B **We set targets but rarely track progress.**
- C **Only a few champions carry the load, most stay on the sidelines.**
- D **We track and report, but members say they lack time or know-how.**
- E **We feel solid—our board meets or beats goals!**



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5 Ways Board Members Can Elevate Your Next Fundraising Event

#1 Pre-Event Donor & Sponsor Outreach

- Identify warm connections to donors/sponsors
- Provide all the information the board member needs to accomplish the task and be available for questions.
(Avoid cold asks!)

From: Jane Doe (jane.doe@email.com)

Subject: Exciting Opportunity to Support *Hope for Tomorrow Gala*—Thought of You!

Hi Alex.

I hope you're doing well! I'm reaching out as a board member of *Helping Hands Foundation*, an organization I'm proud to support because of the incredible impact we make in our community.

We're currently gearing up for our annual fundraising event, *Hope for Tomorrow Gala*, on May 15, and I immediately thought of you and *LocalBiz* as a potential sponsor. It's a fantastic opportunity to showcase your commitment to youth empowerment and connect with over 300 community leaders, donors, and advocates.

I'd love to introduce you to our development team to explore sponsorship opportunities—no pressure, just a quick conversation to see if *there's* a fit. Would you be open to an intro?

Thanks for considering it!

Warmly,

Jane Doe

Board Member, Helping Hands Foundation
(555) 123-4567 | jane.doe@email.com



Tip: Provide a sample message to board members to make outreach easy.



#2 Board Members as Event Promoters

Board Members as:

- Social media advocates
- Email promoters
- Personal Invite Senders

Make sure you have a list of simple ask that board members can do:

- XX Number of Phone Calls
- XX Introductions to an Organization/Month

Social Capital = Fundraising Gold



#3 Board Members' Role During the Event

Strategic Roles

- Table Hosts
- Greeters
- Storytellers

Provide and encourage practice of 30-second donor pitch

- Quick training before the event

Create and share a quick checklist ahead of the event.

Event Checklist

- ✓ **Smile, Engage, Introduce, Listen**
Make guests feel welcome and heard
- ✓ **Know the Event Goals**
Be ready to talk about the fundraising target and what the money supports
- ✓ **Learn the Key Talking Points**
Be familiar with the nonprofit's mission, impact stats, and current priorities
- ✓ **Make Personal Introductions**
Connect guests to staff, other board members, or potential donors/sponsors
- ✓ **Share a Personal Story**
Prepare a short, heartfelt story about why you support the organization

✓ **Mix and Mingle**



#4 Board Members Making the Ask

Challenge

- Board reluctance to ask for donations

Solution

- Provide scripts and role-play exercises, but let your storytelling do the talking
- Build confidence



75% of donors use video to understand a donation impact. [Source](#)



#5 Post-Event Donor Stewardship

Donor retention starts immediately after the event

- First time donor retention is only 20-30%

Board members as donor stewards

- Thank-you calls
- Handwritten notes
- Impact updates

Dear [Donor's First Name,

Wow — thank you so much for joining us at the [Event Name.] and for your generousport!

Your contribution helps us [brief impact statement, e.g., "provide meals for local families, "expand access to after-school programs," etc.], and it's because of donors like you that we're able to keep moving our mission forward.

It was such a joy to see the community come together at the event. I hope you felt the energy, the hope, and the impact we're all creating together. We're thrilled to welcome you into the [Nonprofit Name.] family and hope to stay connected!

With sincere thanks,

T. D.

Donor retention jumps from 33%–41% with just one thank-you call—and up to 58% with more than one call within 90 days. [Source](#)

How Do We Measure Efforts?

Board Member
Accountability Score

Number of donations secure

Board member
participation rate

Event Conversion Rate

Board Member Participation Rate

$$\frac{\text{\# of Contributing Board Members}}{\text{Total \# of Board Members}} \times 100 = \text{Board Member Participation Rate}$$

Example:

$$\frac{6 \text{ Contributors}}{14 \text{ Total Board Members}} \times 100 = 43\%$$

Board Member Participation Rate



Bonus:

Governance Levers to Unlock Fundraising Success

- Establish a clear give/get policy tied to strategic fundraising goals.
- Use a Board Fundraising Scorecard to track individual and collective progress each quarter.
- Align board committees with specific revenue metrics and timelines.
- Educate new board members with fundraising governance training in their first 30 days.
- Leverage a board portal for task assignments, scripts, and real-time accountability.



How Boardable Supports Board Engagement in Fundraising

1.

Centralized Board Communication:

Keep board members aligned and accountable

2.

Task Management & Assignments:

Ensure board members complete fundraising commitments

3.

Document & Template Sharing:

Provide easy access to scripts, talking points and event materials

4.

Board Meeting & Management:

Keep fundraising strategy top of mind in every board meeting



How Board Members Make a Difference

- Started from zero marketing infrastructure
- Equipped with the right tools to streamline work
- Data storytelling to motivate the board
- Raised community visibility
- Simple, repeatable prospect process





Next Steps & Resources

- Request A Demo + Be Entered to Win Nespresso
- Connect with Boardable at marketing@boardable.com
- Follow Boardable & OneCause on LinkedIn for More Special Resources

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Registration is Now Open!

“This was one of the best webinars that I’ve attended. I love that it was super practical and not sales-pitchy!!”

“Thank you for sharing a ton of invaluable information today. I am writing a report to share with my team!”

“This was seriously one of the best webinars that I have attended. It was relevant, packed with great information, lots of energy, and lots of great questions from the attendees.”

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The Art of Fundraising:

Adding Color to *Giving Tuesday & Year-End Success*



Bill Crouch
Founder & CEO

BrightDot Fundraising Advisors

WEDNESDAY, AUGUST 6, 2025

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Weathering Financial Shifts:

What Nonprofits *Need to Know*



Melissa Merriam
OneCause



Rachel Werner
RBW Strategy



Andras Kosaras
Arnold & Porter



Barbara O'Reilly
Windmill Hill Consulting

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