

PRESENTING:

FUNDRAISING



GETTING YOUR BOARD INVOLVED

I. Fundraising Responsibilities





Key Roles of the Board

Set

Set Organizational Direction

Provide

Provide Oversight

Ensure

Ensure Necessary Resources

Ensure Necessary Resources

Hire

Hire capable executive leadership

Promote

Promote positive public image

Ensure

Ensure the presence of a capable and responsible board

Ensure

Ensure adequate financial resources

The Board's Fundraising Responsibilities



XYZ Organization Board Fundraising Responsibilities



Define

Clearly define annual fundraising goals



Delegate

Delegate responsibilities to meet these goals



Create

Create fundraising and donor recognition policies



Ensure

Ensure fundraising methods adhere to ethical standards

Individual Board Member Responsibilities



Make personal contributions



Identify, evaluate, and cultivate prospects



Attend face-to-face solicitations



Write appeal letters



Organize and attend special events



Thank donors

XYZ Organization's Individual Board Member Responsibilities



Make

Make an annual personal contribution, a "stretch" gift



Raise

Raise at least \$5,000 from additional donors



Attend

Attend our special fundraising events

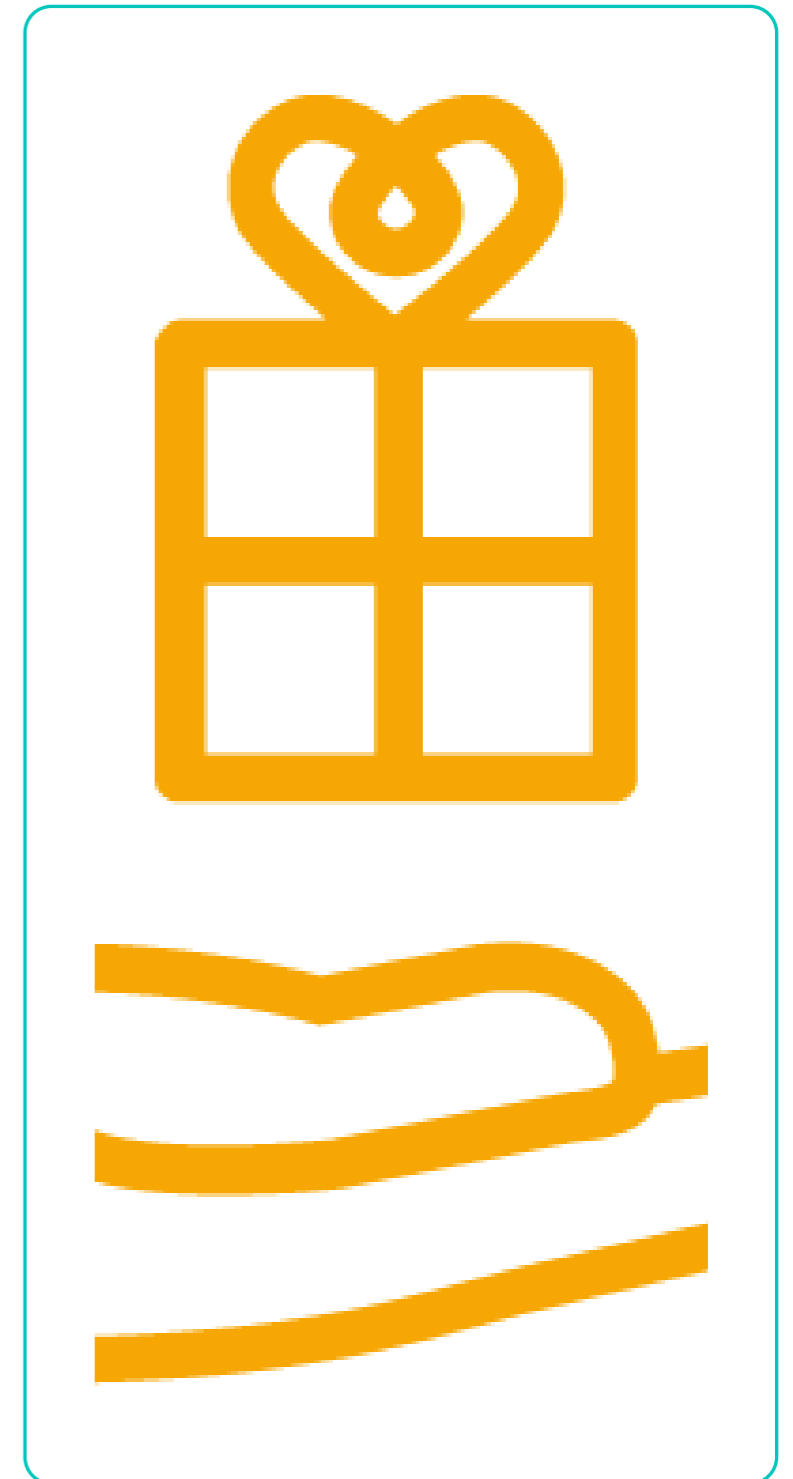


Be

Be available to assist with other fundraising efforts

Why Board Members Should Give

- Demonstrates personal commitment
- Encourages other funders to give
- Creates board member “ownership”



Sample Fundraising Committee Job Description



- Lead board's participation
- Work with staff to develop fundraising plan
- Develop fundraising policies, plans, procedures, and schedules for board
- Teach board members fundraising skills and techniques
- Propose minimum board member contributions
- Solicit contributions from board members
- Lead the board's effort in identifying, cultivating, and approaching major donors

Sample Development Director Job Description



- Work with the board and chief executive to develop long-term fundraising strategy
- Organize and execute fundraising programs
- Develop relationships with funders
- Coordinate visits by staff and board members
- Plan and oversee donor recognition and cultivation
- Work with staff to design promotional materials for fundraising

Typical Fundraising Duties of the Chief Executive



Serve as the organization's representative to potential funders and the community

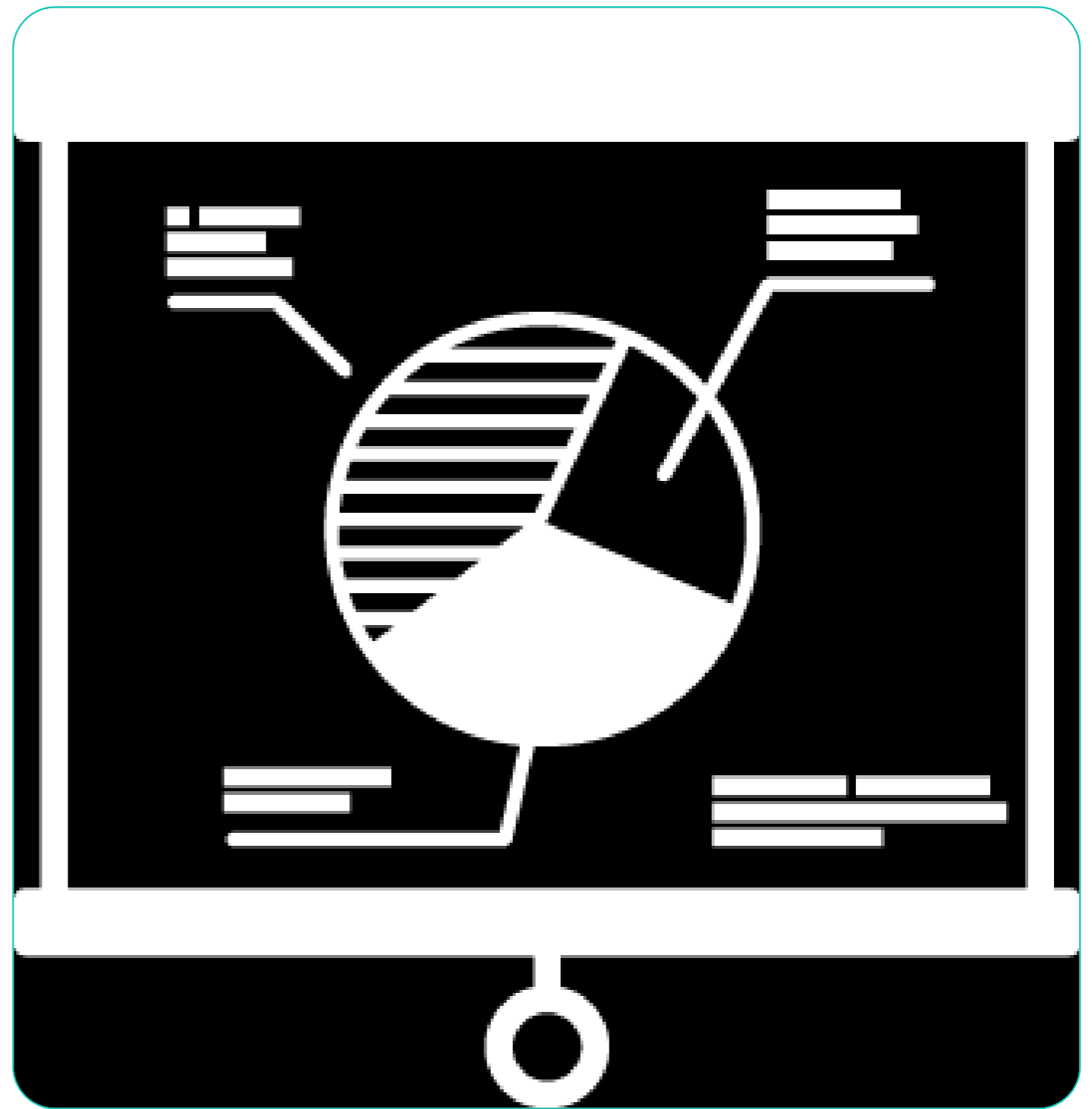


Serve as a contact for donors



Ensure compliance with funding sources and regulatory requirements

II. Giving



Why People Give to Nonprofits

They feel a connection to the organization

Their peers are giving

Someone asks them to

To make a difference

To share their good fortune

For recognition

To ensure the organization's ability to fulfill its mission in the future

For tax reasons

To ensure their pet project finds a home



Why People Do Not Give to Nonprofits

Solicitation is infrequent or poorly communicated

They don't see how their gift would make a difference

They never feel wanted or needed

They receive no direct, personalized appeal

They gave an unacknowledged gift in the past

They were not asked to give

The timing wasn't right

The organization's mission was not compelling



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Fundraising Checklist: Level 1 – Building the Foundation



Mark each: Y = YES N = NO M = MAYBE (No more than 10 Maybes)

How many are you willing to undertake?

Commit to the organization's vision and mission. Be willing to learn more about how to give and get contributed resources.

Aid in the creation of the fund development plan. Understand the plan's implications. Be willing to help execute it. (If you cannot, state why this is and be willing to work toward consensus on some revisions.)

Decide realistic budget allocations for the organization's fundraising program. (Be patient about how fast new income will be received, but ask questions, offer suggestions, and operate by agreed-upon procedures and assignments.)

Understand the organization's financial situation and probable future funding position. (Resist quick fixes and short-range decisions. Probe until you become convinced money is wisely used and staff is accountable.)

Evaluate progress by asking friendly, but searching, questions. (Are we doing what we agreed to do? If no, why not? Are we getting improved results as time goes on? What specifically? If no, why? What reasonable changes might be explored? What do we require that is not available currently? Expertise? Staff time? Volunteers? Commitment level?)

Approve the creation or revision of a board member statement of responsibilities that includes clearly defined expectations for their personal giving and involvement in fundraising.

_____ **Total (2 points for each yes)**

Fundraising Checklist: Level 2 – Friend Raising



Provide the names and addresses of donor prospects for the development mailing list. (Share pertinent information about your contacts: individual preferences, interest level, any misgivings about the cause, and their inclination to donate money.)

Research phone numbers or secure exact addresses for campaign mailings.

Attend training workshop(s) to discover how better to carry out your role and to augment the overall development process.

Prepare useful and informative training materials for board members and other volunteers about how to raise funds.

Advocate for the organization or cause and serve as an enthusiastic community relations representative. (Understand the organization's mission and programs and be prepared to answer common questions. Prompt others in the community to begin participating in the work of the organization.)

Acquire mailing lists from a variety of sources in the community to augment the organization's database.

Facilitate introductions and access to individuals or groups where you have credibility and influence. Nurture prospects and donors on a regular basis.

Fundraising Checklist: Level 2 – Friend Raising



Distribute (hand deliver) invitations or promotional material to targeted markets: individuals, businesses, churches, temples, community groups, or clubs.

Spearhead the formation of a business and professional advisory group and encourage one of your own professional advisors (such as a CPA or an attorney) to become involved.

Find and relate one or more human-interest stories to illustrate why gifts are needed and how they are used to provide, enhance, or expand your organization's outreach and impact.

Brainstorm innovative ways to thank and recognize donors. For instance, arrange a special "thank-a-thon" in which board members phone donors to express gratitude for their contributions with no solicitation included in the conversation.

Write a personal testimonial or letter of support for public use or agree to be quoted as to why you support the organization.

Assist in fundraising special events such as auctions, fairs, bazaars, open houses, tours, or tournaments. Enlist others to help in ways that they perceive are useful and fun, so they will want to do it again. Welcome newcomers, circulate and mingle to spread a friendly spirit, learn names, and discover common interests.

Visit a community leader to explain needs to be met and accomplishments of the organization. Initiate follow-up visits to sustain and increase interest.

_____ **Total (1 points for each yes)**

Fundraising Checklist: Level 3 – Solicitation



Contact local businesses and vendor suppliers to seek an in-kind donation, such as supplies, equipment, technical assistance, or personnel (interns, released time, loaned executives, etc.)

Personalize the annual direct mail program or other endorsed campaign by using at least two of the following techniques:

- Hand address envelopes for use with top donors
- Add a personal P.S. or thank-you on the prepared acknowledgements
- Compose and send your note of appreciation for a gift
- Phone to thank some of those who responded

Increase your donation each year to help reach the goal and assist in setting the pace for others so that you will become a credible solicitor.

Request a pledge or a contribution from designated prospects or lapsed donors.

Solicit a cash contribution from a service club, civic group, or church or temple, or request a gift for a particular promotion or publication.

Ask selected individuals for a specific gift or a multiyear pledge. Visit them personally, accompanied by a staff member or another volunteer.

_____ **Total (2 points for each yes)**

Section III. Stages of Fundraising





Stage One: Cultivation

1

Identifying potential donors (prospects)

2

Building relationships with prospects

3

Generating interest in the organization

4

Showing prospects what the organization is all about – history, programs, finances, etc.

Stage Two: Solicitation



Presenting the organization's case statement



Participating in one-on-one solicitation



Sending direct mail pieces with personalized notes



Making telephone solicitations

Stage Three: Stewardship



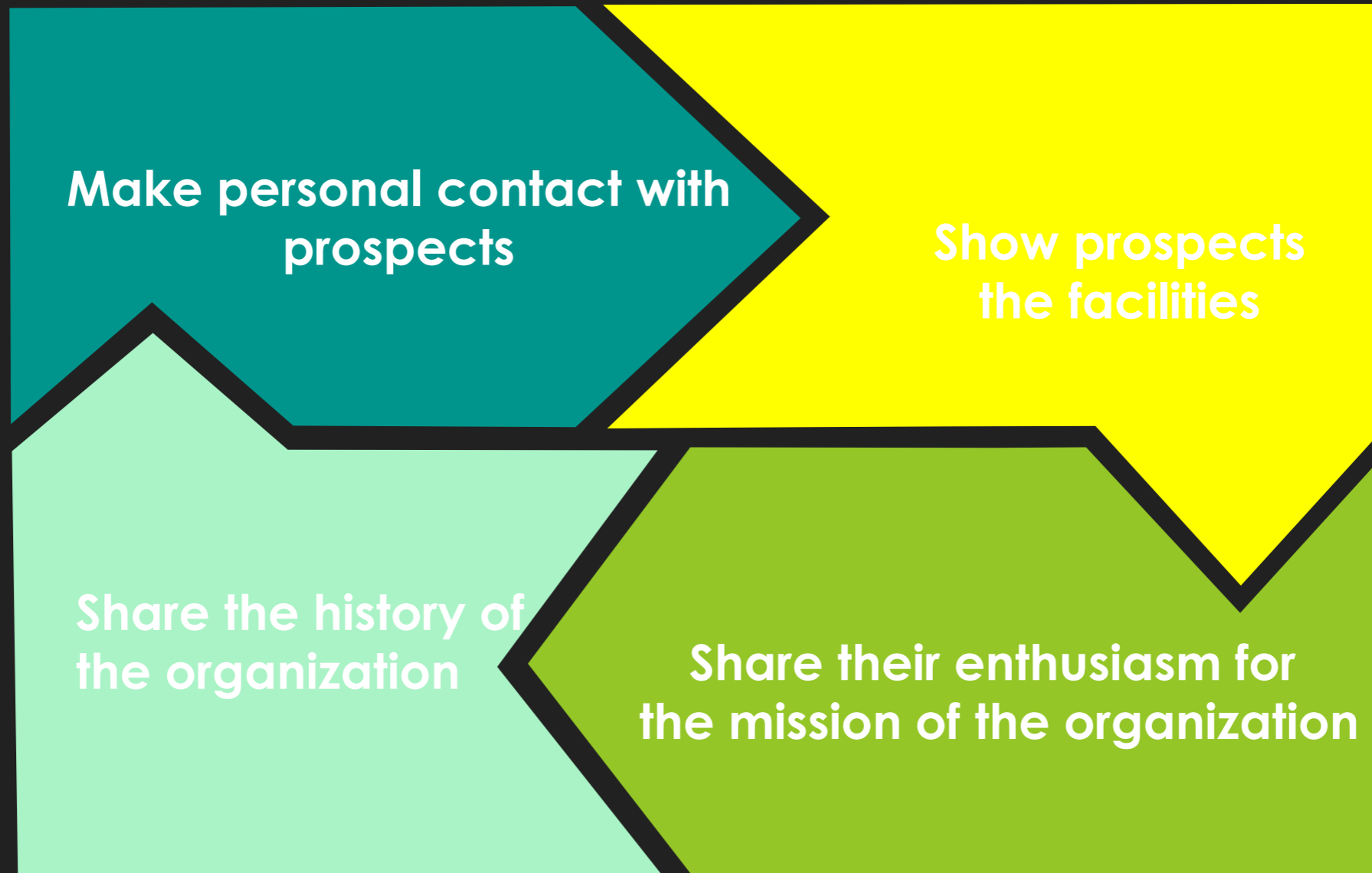
Thanking

Thanking donors and letting them know their gift made a difference

Maintaining

- Maintaining donor relationships
- Thank you letters
 - Donor recognition activities
 - Invitations to special events
 - Updates from the organization

How Board Members Can Get Involved in Cultivation



How Board Members Can Get Involved in Solicitation

○ Writing/Reviewing the Case Statement

- Focus on the results, not the organization's needs
- Include clear, essential facts
- Add a connection to the community



How Board Members Can Contribute to Solicitation

Making the Ask

Notify the prospect you are coming

Be enthusiastic and know the prospect's interests in advance

- Bring a staff member to answer specific questions
- Research the donor's giving history to determine the appropriate amount to ask for

How Board Members Can Get Involved in Stewardship

- Send letters of appreciation and invitations to special events
- Maintain relationships with donors
- Personally thank donors for their contributions
- Keep donors connected to the organization



How to Handle Rejection

Don't take it personally

Offer any additional information needed to change the prospect's mind

Keep the door open

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 by not trying.**

Fundraising Secrets of Success

Contact

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Questions?