

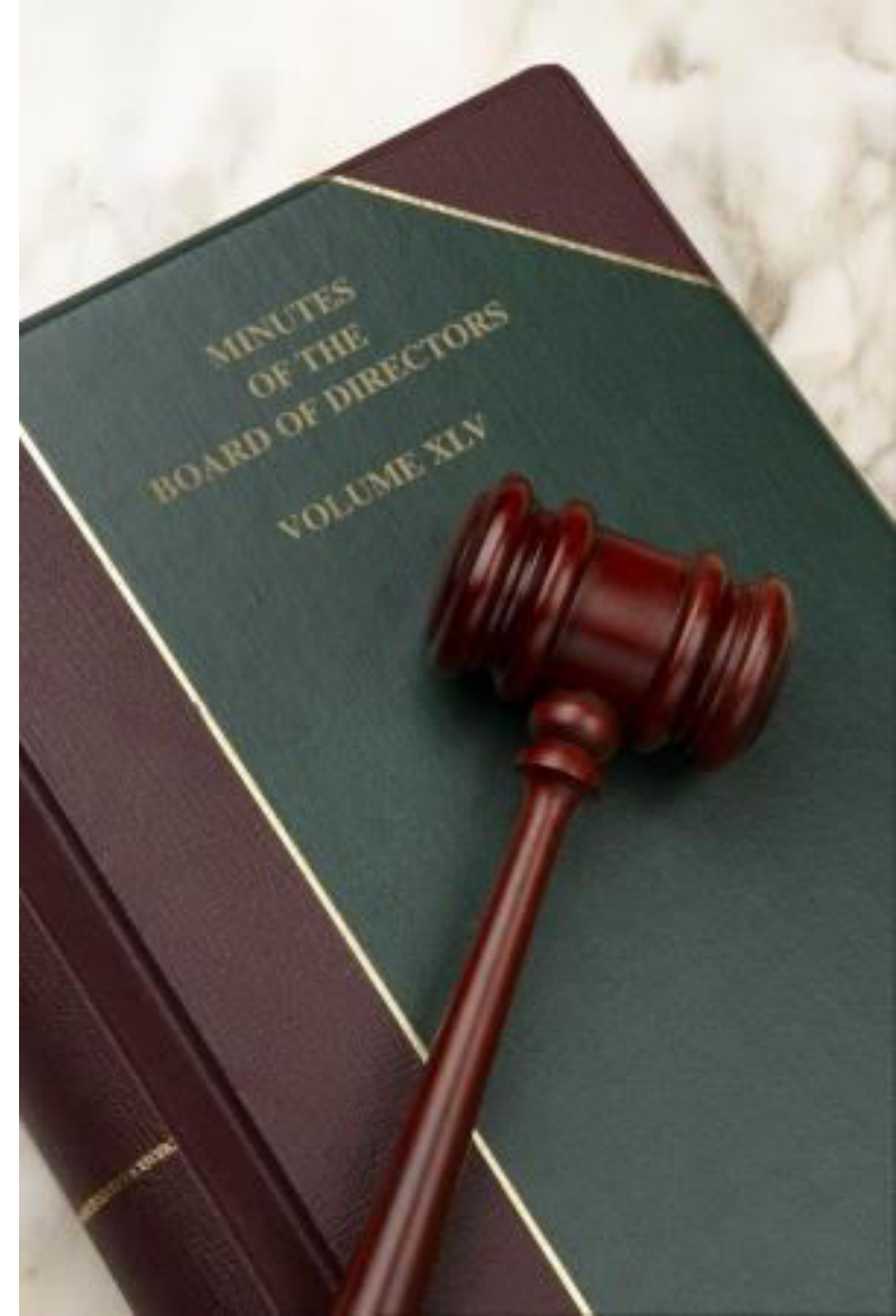
Presenter: Lori L. Jacobwith, Founder, Ignited Fundraising

Expanding Your Reach *Engaging Your Board*



Today

1. Fundraising vs. Development
2. Board Work
3. 7 Ways to Support Fund Development
- *Without Asking for Money*
4. Sharing Expectations
5. Visual Displays & Dashboards
6. Most Important Thought of The Day
7. What's Next?



Biggest Board Challenges?



Fundraising vs 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)*



Fund Development

The total process by which an organization increases public understanding...

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



Development: Everyone's Job



Together
Everyone
Achieves
More

Board Work – What It Takes



Basic Duties & Responsibilities

- Ensure you are fulfilling your Mission and Purpose
- Engage in Strategic Thinking & Planning
- Approve and Monitor the Work of your Organization or Foundation
- **Ensure Adequate Financial Resources**
- Provide Effective Fiscal Oversight
- Ensure Sound Risk Management Policies



Basic Duties & Responsibilities

AND...

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



How Much Training Do You Provide in Each of Those Areas?



What If...



- Many of your board members don't really know what they *should* be doing?
- What they DO know is mainly about fiduciary oversight & paying attention to the bottom line?
- They really DO want to be stretched, but that idea scares them?
- When the reason they tune out and their performance wanes is they are bored?

7 Ways To Participate In
Fund Development
Without Asking For Money

1. Make a personal financial gift.



2. Invite others to give
time, talent, advice...



3. Act as an Ambassador & Advocate

Really.



4. Thank Recent Happy Donors





ACT FAST!



In 2014, the average donor retention across all nonprofits was **43%**
The average donor attrition rate was a staggering **57%**



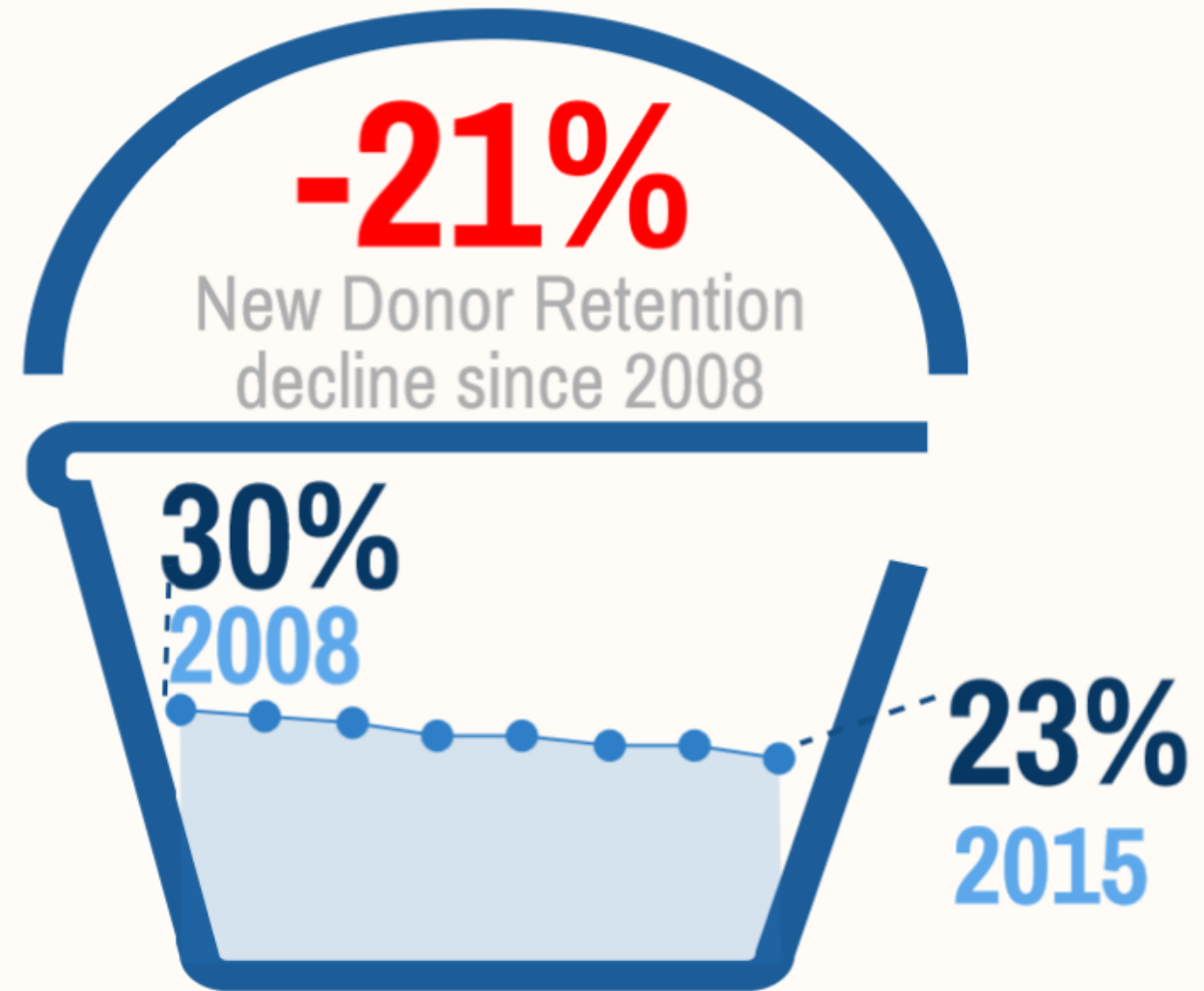
Over the past 10 years,
the average annual
donor retention rate is
46%



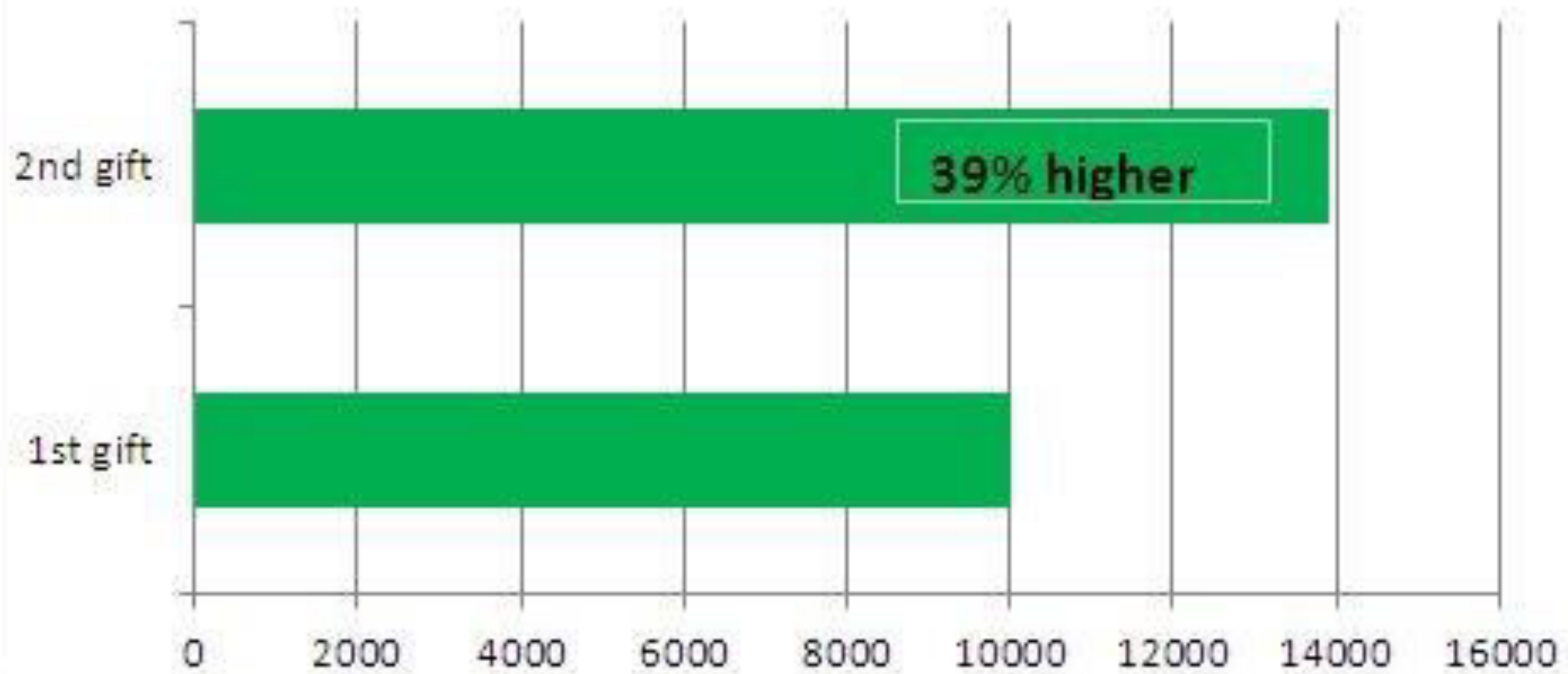
The donor retention
rate peaked at
50%
in 2008

NEW DONOR RETENTION

2/10 New Donors
continue to give

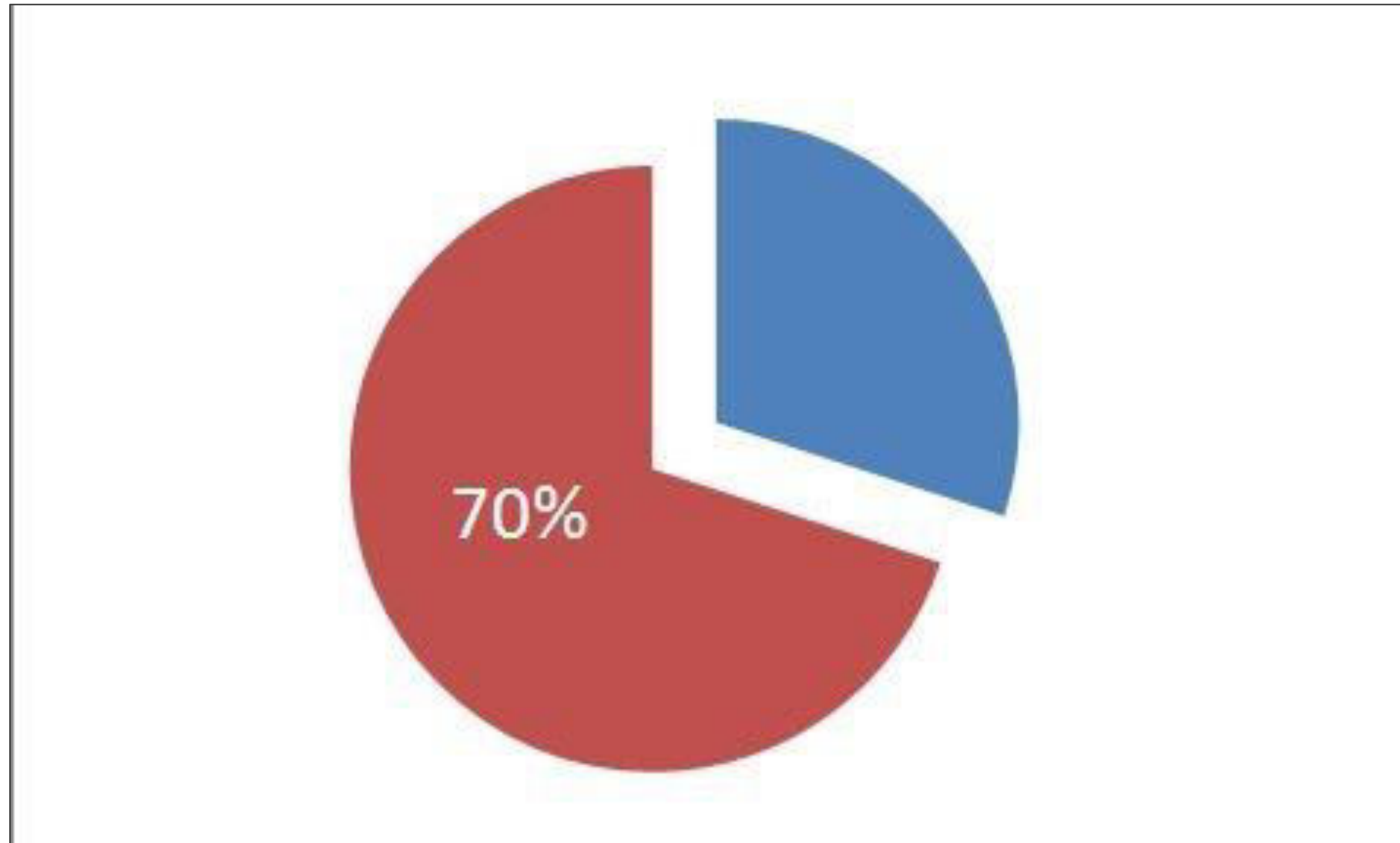


Board Thank You Calls to 1st Time Donors



Source: Donor Centered Fundraising, Penelope Burk & Cygnus Research

2 years later...70% retained



Source: Donor Centered Fundraising, Penelope Burk & Cygnus Research

Build A Relationship for Loyalty

Create a simple system to make thank you calls & know your donors.



5. Raise Awareness:

Share a people story that paints a clear picture of your impact...and your donors impact.



Image Source: United Church Outreach Ministry

Board Members & Storytelling

Board members & Storytelling;
a powerful combination

www.501Videos.com

<http://bit.ly/Boardmemberspowerfulstorytelling>

Cutting through
the clutter of day
to day noise...



I Want to Feel My Impact

Put a Story and Face
to What / Cause



Photo: Marcela Gara, Resource Media – from DCSEU Facebook

A grayscale photograph of a diverse group of business professionals in a meeting. They are gathered around a table, looking at a laptop screen. The image is semi-transparent, serving as a background for the text.

6. Raise Awareness:

Share updates about your money story. Explain how different gift sizes make a difference for one child or parent.

Combine People & Money Story



Message Pyramid

Understanding
comes from the
top down

Why you Exist:
What's Missing in the Community

Your Money Story

Startling
Stats

One
Person
Example

Conversations
come from the
bottom up



Other “Gap” Messages

Volunteers?

Board members?

Materials or equipment?

Visibility?

Yours?



7. Create a Culture of Accountability



Accountability = Success



Accountability

“...being held responsible for one's actions... by others or yourself.”



Four Necessary Ingredients for Holding People Accountable:

1. Establish clear expectations;
2. Prepare people to meet those expectations with needed training and support;
- 3. Monitoring performance,** and
4. Attach consequences to the results



Clearly Sharing Expectations

Communication



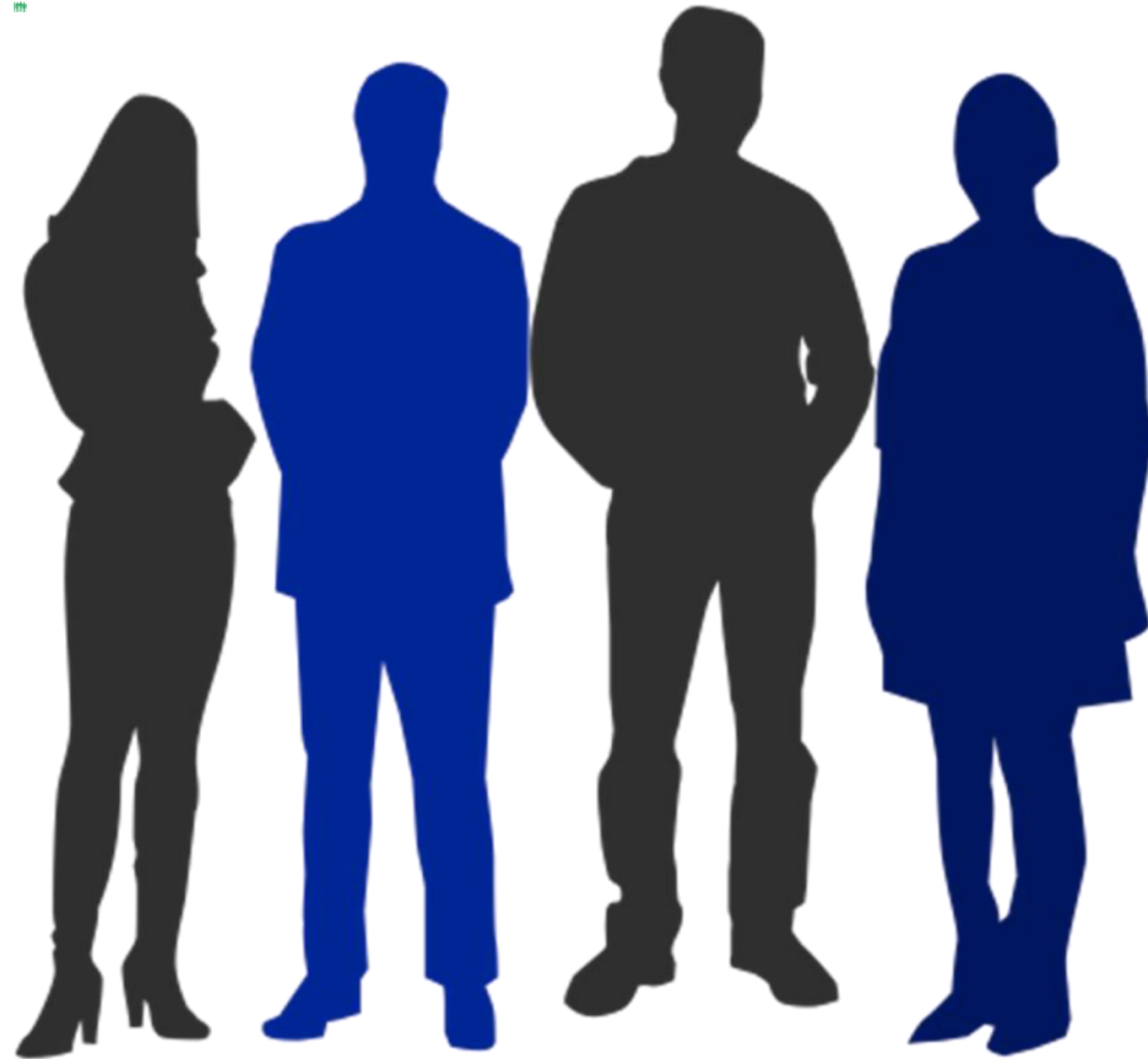
Creating A Team

Is all about Communication

- What do you want me to do?
- How do I do it?
- What will happen when I do it?
- ...or don't do it?



Team? What Team?



Raise More With A Fundraising Team Leader

Their job is to make sure these questions (and others), get answered regularly:

- Who just made a contribution?
- Who will call to thank them?
- Who will send the meaningful printed thank you letter/receipt?
- What is our plan to add new donors this month? This year?



<http://bit.ly/FireStarterFundraisingTeamLeader>

What Exactly Do You Want Your Board To Do?



TOMTOM

Board Members: Identify & Recruit

1. Know what you are looking for
2. Set expectations early



Board Tools eBook



www.ignitedfundraising.com/training/free/

Recruiting Board Members & Other Volunteers: Use An Application



Board Application Form

1

Candidate Name _____
Mailing Address _____
City _____ State _____ Zip _____
Home Phone _____ Work Phone _____
Email _____

2

Current Position _____
Current Employer _____

3

Relevant experience and/or employment (*please attach resumé*).

4

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

- | | | |
|---------------------------------------------|-----------------------------------------------------|-----------------------------------------------|
| <input type="checkbox"/> Fundraising | <input type="checkbox"/> Strategic Planning | <input type="checkbox"/> Legislative Contacts |
| <input type="checkbox"/> Special Events | <input type="checkbox"/> Financial/Accounting | <input type="checkbox"/> Evaluation |
| <input type="checkbox"/> Capital Campaign | <input type="checkbox"/> Public Policy Advocacy | <input type="checkbox"/> Technology |
| <input type="checkbox"/> Policy Development | <input type="checkbox"/> Public Relations/Marketing | |

5

Please list prior experience serving as a board member for other non-profit organizations:

Orienting Board Members Use A Repeatable *Engaging* Format



Board Orientation Checklist

First & Last Name _____
Address _____
Email _____
Home Phone _____ Work Phone _____
Mobile _____
Preferred time and method of contact: _____

Describe the Organization to Your New Board Member

We are _____

We specialize in (serving) _____

We help them to (do what?) _____

Board Orientation Process

1. Includes at least one special meeting no longer than 1 hour of “working” time.
2. Is a peer-to-peer meeting with key staff leadership handling brief aspects of organization’s programs, budget and annual fundraising plan.
3. Is held in a location where program services can be observed, if possible.
4. Allows for questions from new board members and “pre-determined” mission immersion: Client guest speaker, short video of client stories, stories shared about clients.
5. Includes personal phone call follow-up from the assigned “Board Buddy” within 3 days of the orientation.
6. Board Buddy provides ongoing contact for as long as needed to ensure a powerful onboarding of information and expectations to and from the new board member.

At a Special Meeting Led by Board Members Clarify and Fully Explain

- Meeting attendance – full board & committee meetings
- Committee structure
- Board role and relationship to administrator/staff leadership
- Mission and vision
- Governance goals
- Fund development expectations
- Annual board agreement

Board Orientation Packet

- Statement of purpose or mission (if developed and adopted by the Board)
- Brief overview of agency programs and services
- Agency annual report with financial statements for the past fiscal year
- Minutes for most recent Board meeting including most recent financial statements and current annual budget
- Current board agreement
- Current board activity dashboard
- List of all Board members’ names, addresses, phone numbers, and terms of office
- Committee list with chairperson clearly identified
- Jargon cheat sheet: Glossary of abbreviations and acronyms of programs, referral agencies, fundraising events, etc.

Later or 2nd Meeting

- Personnel policies or brief overview of personnel system. To include: staff organization chart, number of professional and non-professional staff, full-time and part-time staff, and date of last major revision of Personnel Policies
- Policy statement and procedures which have been formally adopted by the Board
- Bylaws
- Board organization chart with committee and sub-committee structure
- Dashboard with easy to read financials and fundraising measures at a glance

First Personal Phone Call With Experienced “Board Buddy”

- Debrief of recent orientation meeting. Identify any unasked questions
- Reminder of upcoming meetings, events, and attendance expectations
- More thorough explanation of upcoming votes or significant board decisions
- Discussion of committee selection based on new board member talents

Ongoing Contact Between “Board Buddy” and New Board Member

- Make sure committee involvement has begun. If not, identify barriers
- Continue to reinforce governance and mission focus
- Ensure board member is feeling utilized and energized by their board service

Accountability = Success



For Ongoing Effectiveness: Use A Board Agreement



Sample Board Agreement

[YOUR ORG NAME] Board Member Commitment Form

I recognize our organization's ability to change lives is raising funds in support of programs and operations. I volunteer in a leadership role, I acknowledge a personal commitment to the causes I support. The assistance that I provide. Regardless of their nature, my contributions will be pe

As a board member of _____, I pledge to my fellow directors that I will fulfill the basic board member commitments I have indicated below.

I agree to be supported and held accountable by my fellow board members in accordance with my agreements.

BASIC BOARD AGREEMENT: I agree to fulfill the following agreements:

1. Make a financial contribution at a level that is significant to the organization
2. Serve as a Table Host and recruit others to be a table host at fundraising events
3. Actively participate on a board committee
(_____)
Indicate Committee Name(s)

ADDITIONAL BOARD COMMITMENTS: I agree to fulfill the following volunteer duties by participation in fund development activities on the following page.

Please return form to:

Please return this form by: _____

Date

Signature

MAJOR GIFTS

- Make a personal gift (\$5,000 or more)
- Coordinate major gift campaign (gift of \$5000+) directed to the organization
- Accompany Director on 1 solicitation call
- Identify & assist with research about 1 or 2 major individuals
- Visit 1-2 major donor prospects
- Host an in-home reception for 10-20 donor prospects
- Make a cash/stock/planned gift to the endowment fund

ANNUAL CAMPAIGN

- Make thank you calls to 5 donors per month as needed
- Write acknowledgement notes to 5-10 donors by year-end
- Send annual appeal to 10 personal contacts with a personal message
- Identify prospects to attend informational sessions
- Serve as table host or recruit table host for annual fundraising event
- Make a personal pledge to join the Giving Circle

FOUNDATION/CORPORATION PROPOSALS

- Identify and research 1-2 Foundation/Corporation proposals
- Assist in writing grant proposals or letters of support for proposals
- Participate in site visits to 1-2 Foundation/Corporation facilities
- Develop a relationship with 1-2 Foundation/Corporation representatives

EVENTS (i.e., [name events here])

- Participate on one event planning sub-committee; duties assigned
- Obtain one corporate sponsorship, or provide entry to 3-5 events
- Identify or host 3rd party events (other organizations holding events)
- Attend 2 events annually in addition to committee and board events

PUBLIC RELATIONS

- Draft one article or personal story for newsletter or annual report
- Participate on Marketing & Public Relations Task Force and/or committee

IN-KIND CONTRIBUTIONS

- Provide or seek in-kind goods & services such as: gift certificates, services, etc.
- Host a Board or Committee meeting or a Research Reception

Please return form to:

Please return this form by: _____

Date

Signature



FUEL TO IGNITE YOUR FUNDRAISING

Board and Committee Engagement

Board and Committee Member "Menu" of Engagement Form

This is an "all-you-can-eat" menu! Please choose as many items as you like—but at least one per category. A monthly update will be provided at board & committee meetings based on your input, using a tracking document

Name: _____ Date: _____

APPETIZERS

- Make thank you calls to 10 donors annually
- Once a year share e-news with 5 friends/colleagues
- Provide names of 10 donor prospects
- Sign and personalize letters to 15 current or prospective donors
- Write short article: "Why I care for [YOUR ORG NAME]" for e-news
- Bring 5 guests to tour and learn more about us annually

ENTREES

- Make a financial gift that is significant to me -- requested by ALL**
- Secure a financial contribution from my place of business
 - Identify 2 new community members to serve on the board
 - Host a donor recognition or fundraising event at my home or work
 - Bring 15 guests to tour & learn about us annually
 - Attend a donor ask with staff
 - Include [YOUR ORG NAME] in my estate plan

DESSERTS

- Make thank you calls to 15 donors annually
- Be assigned to and stay in contact annually with 2-3 donors
- Bring 10 guests to tour & learn more about us annually
- Post comments and/or photos occasionally on Facebook
- Once a year share e-news with 15 friends/colleagues
- Share at least 3 client stories with my community annually

Board Self-Assessment

- PERFORMANCE EVALUATION
- OUTSTANDING
 - COMMENDABLE
 - SATISFACTORY
 - NEEDS IMPROVEMENT
 - UNSATISFACTORY
- 

A signpost with five directional signs. The top sign is horizontal and reads 'CORE VALUES'. Below it are four signs pointing in different directions: 'INTEGRITY' (left), 'ETHICS' (right), 'PRINCIPLES' (left), and 'ACCOUNTABILITY' (right). The signpost is a blue pole against a blue sky with clouds.

CORE VALUES

INTEGRITY

ETHICS

PRINCIPLES

ACCOUNTABILITY

Visual Displays & Dashboards

What's The Feeling At The
End of Your Meetings?



Make It Easy To See What To Discuss and Where to Take Action



1. Finance			
	Target	6 months ago	Now
Days of unrestricted cash on hand	45 days	65 days	18 days
Net surplus or deficit YTD compared with YTD budget	Within 25K or better	\$42,500 worse than budget	\$28,000 worse than budget-to-date
Government funding year-to-date (52% of budget)	Within 3%	\$39,000 worse than budget	\$3,200 worse than budget, 24 days
Days from end of month to financial statements	24 days	67 days	48 days

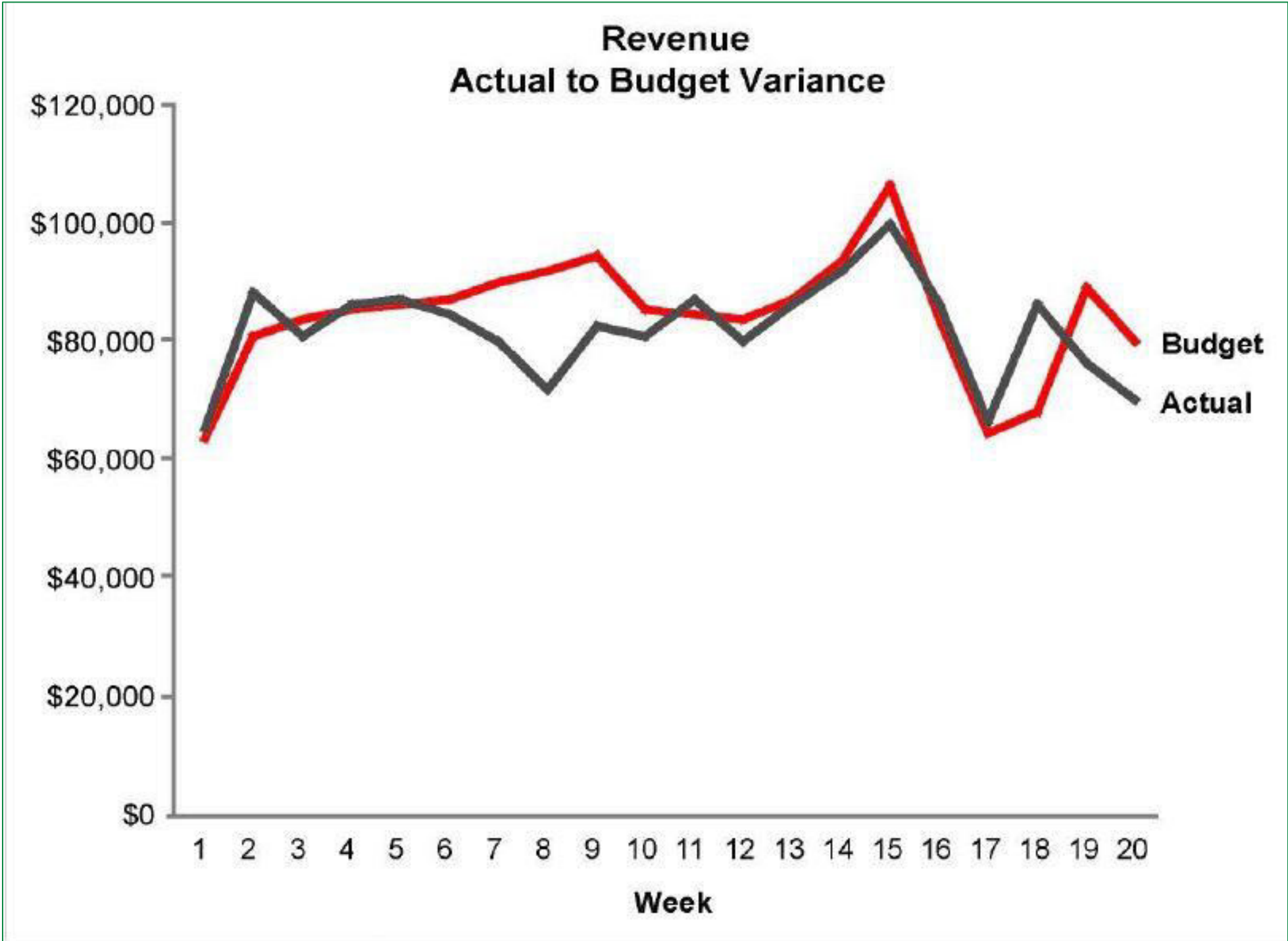


Figure 5: This graph fails to express the variance amount directly.

~ Stephen Few, Dashboard Whitepaper, 2006

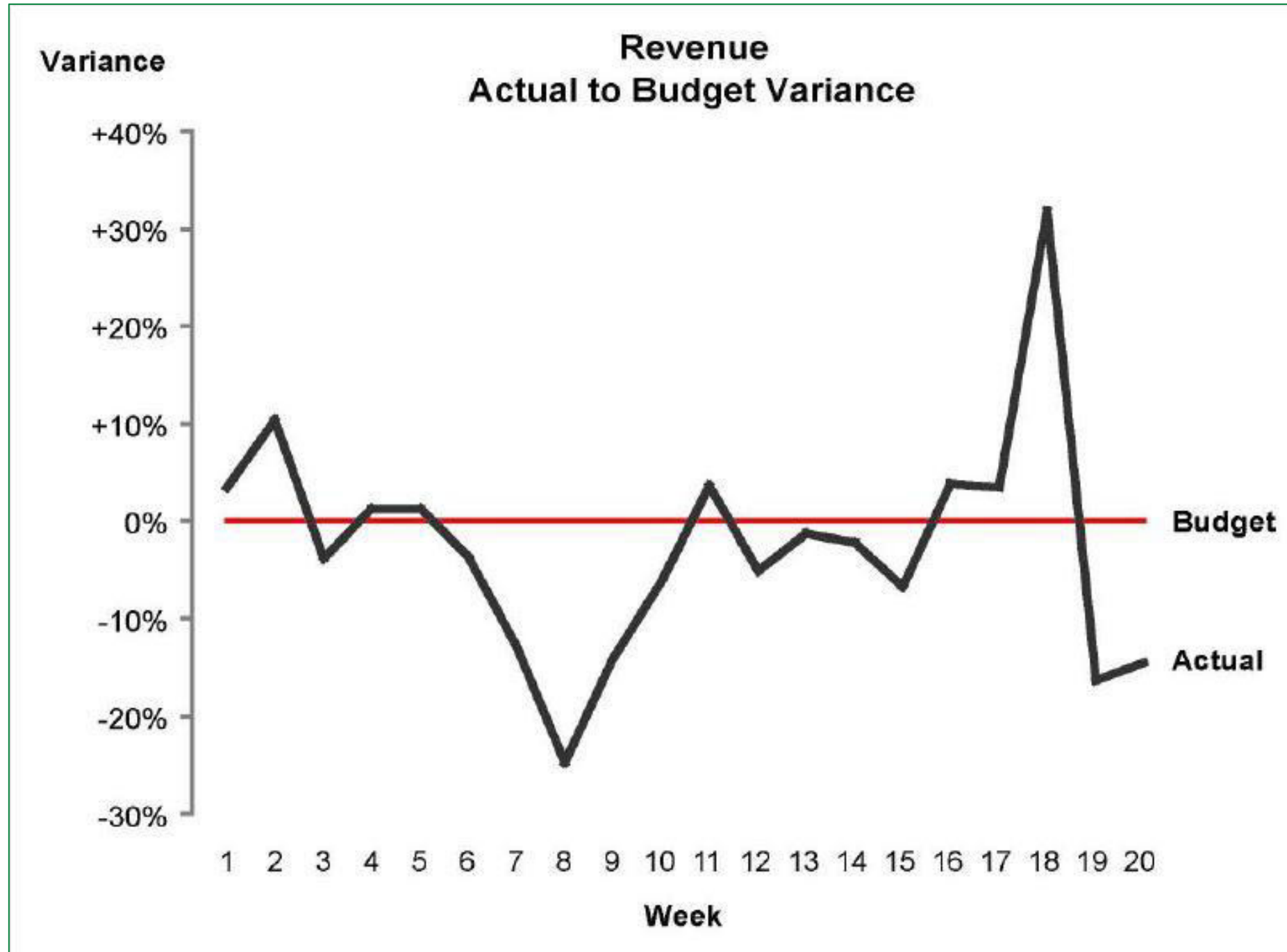
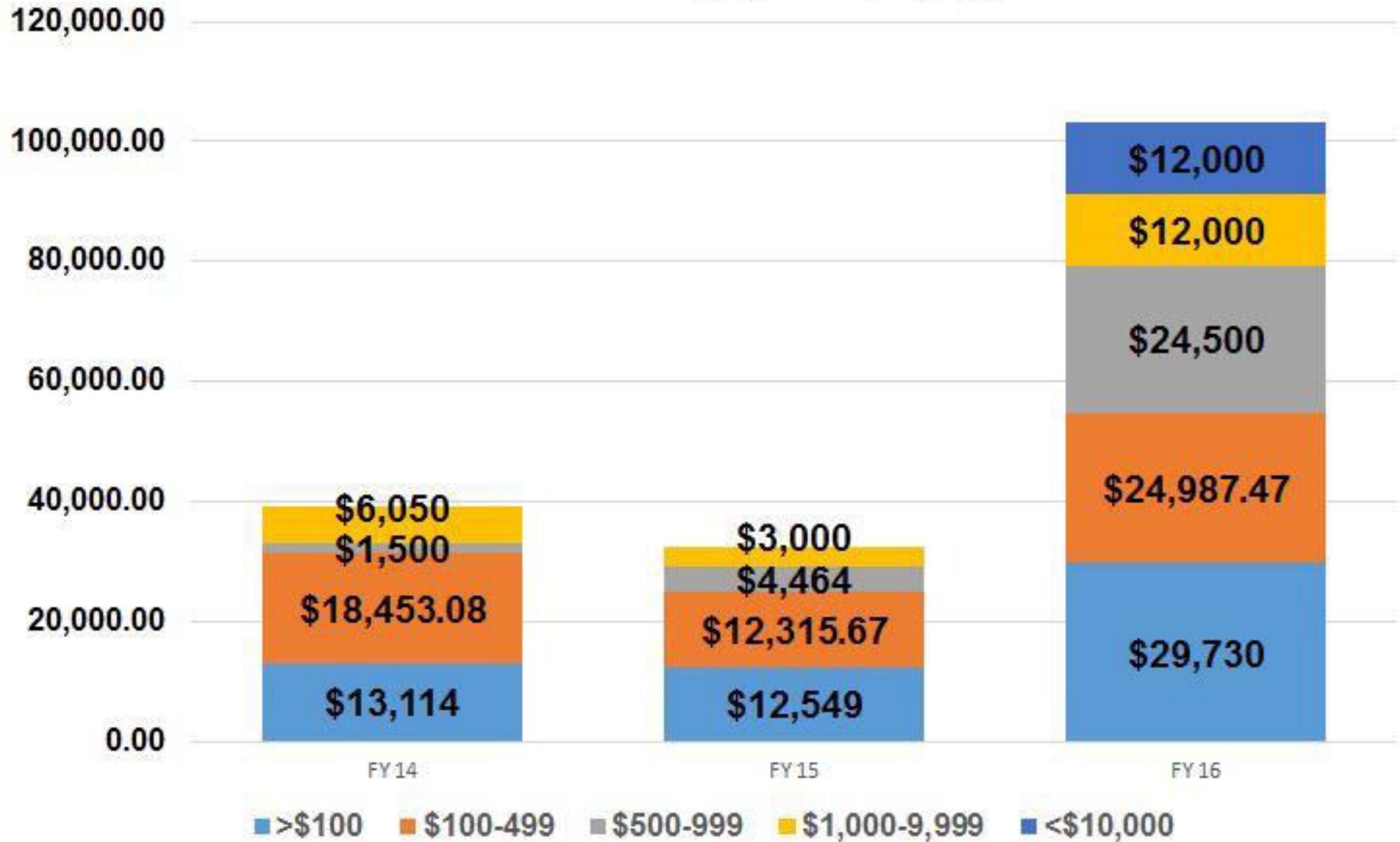


Figure 6: This graph directly expresses the variance between actual and budgeted revenue, making it much easier to see and evaluate.

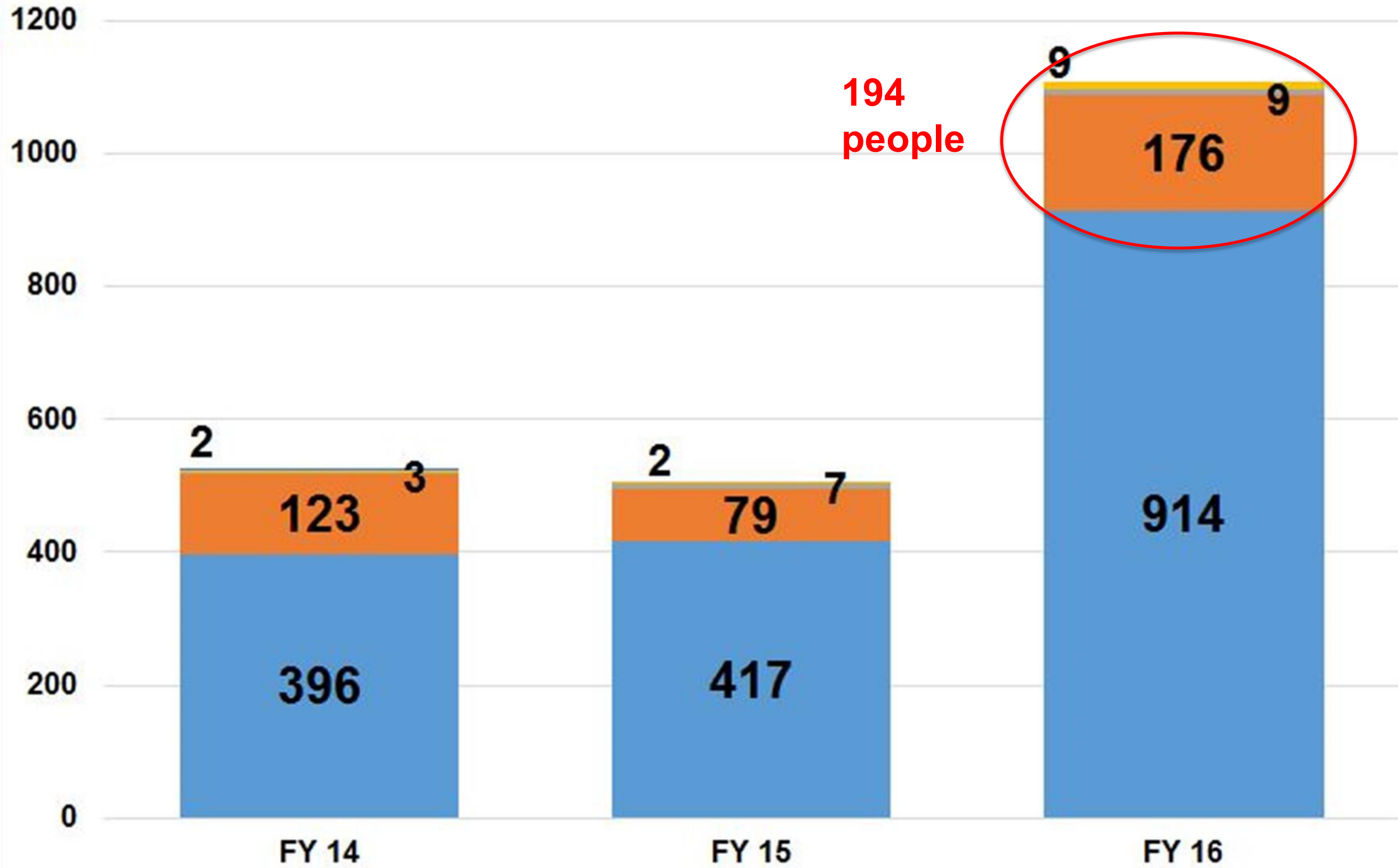
Know & Share Your Donor Data



Individual Giving By Category (\$)



Individual Giving By Category (# of Donors)

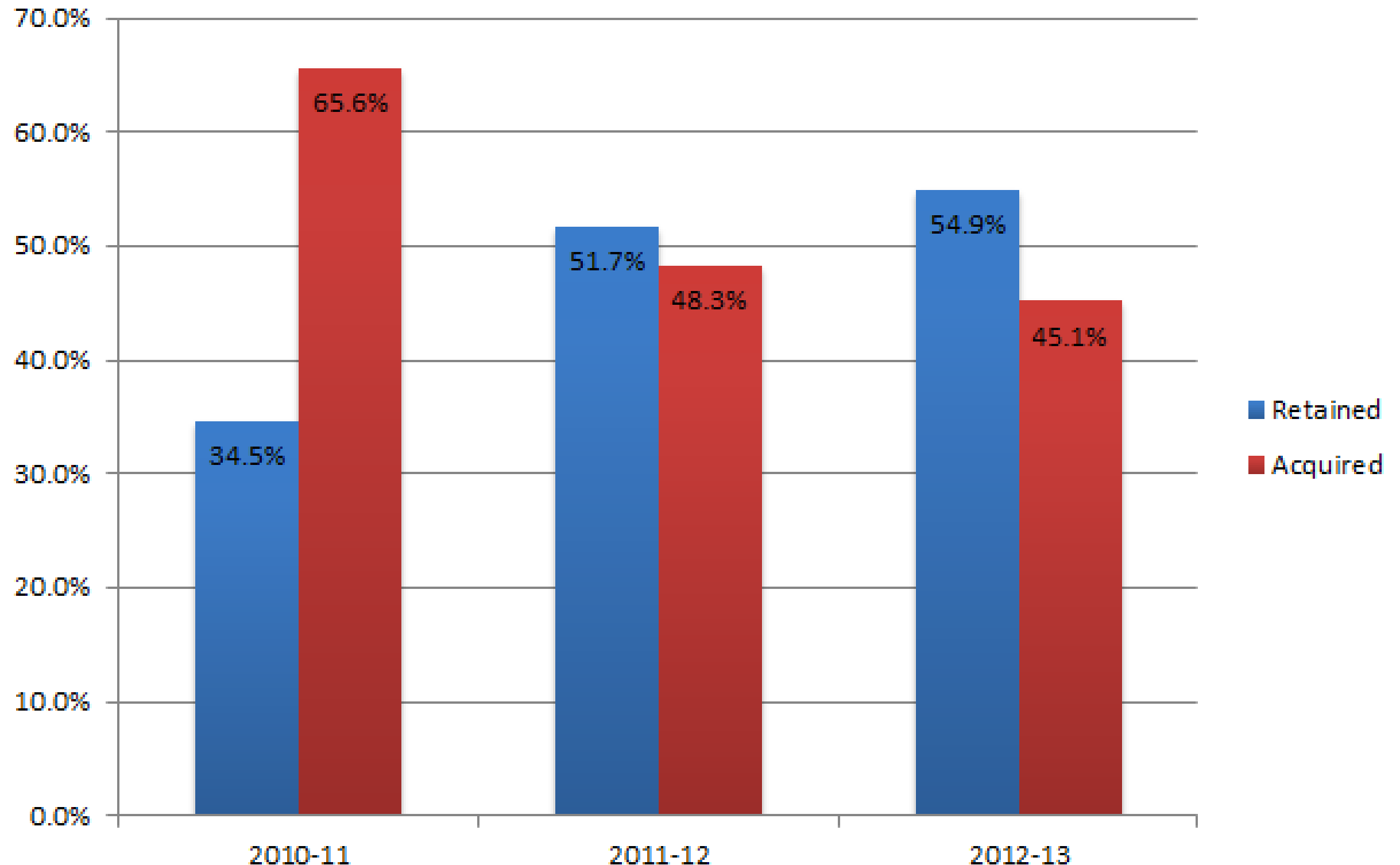


Donor Retention

It takes 4 ½ times the resources, staff and effort to get a new donor as it takes to get a renewal.

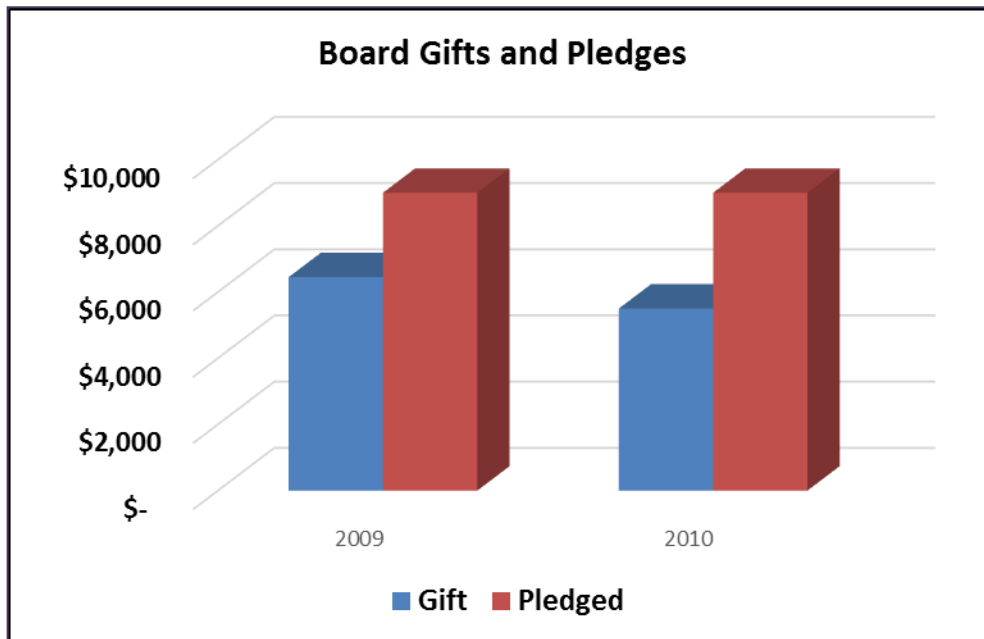
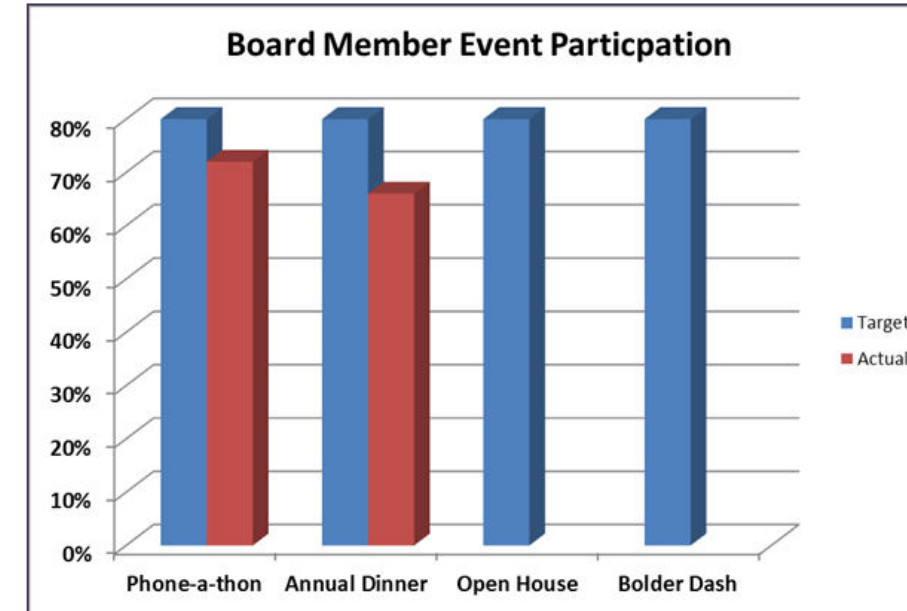
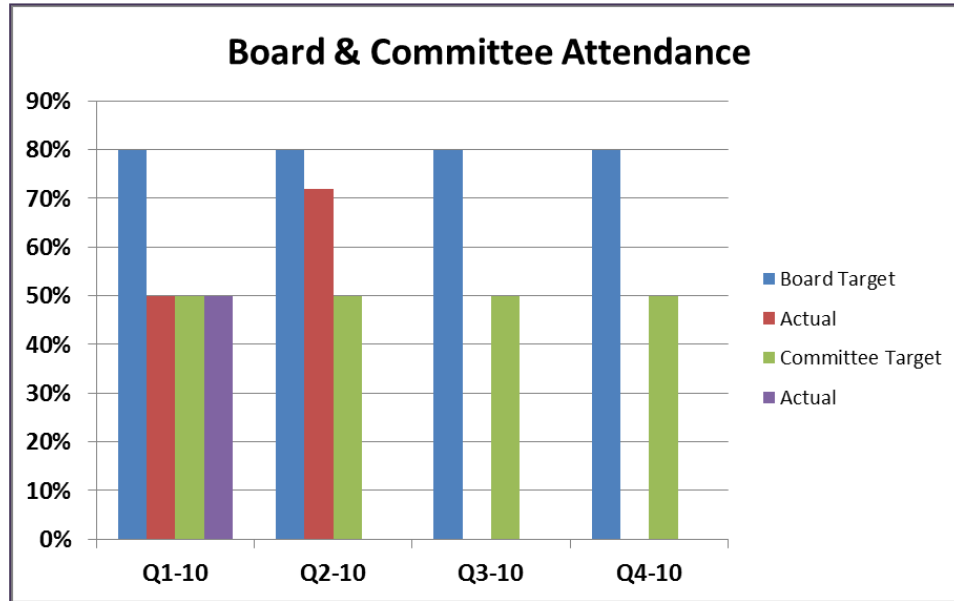


Donor Retention vs. Acquisition



Your Organization Name Here

Governance Scorecard



What else?

Most Important
Thought Today

100%

-- *Lori's Motto* --

It is 100% staff responsibility
for board members to be

GREAT.

AND 100% board responsibility to

DO WHAT WE

SAID WE'D DO.

Caught Ya Doin Good



Staff Role

Implement communication strategies & tools to ensure expectations are met.



Communication

You have a rare opportunity to empower your board members to feel like superheroes.

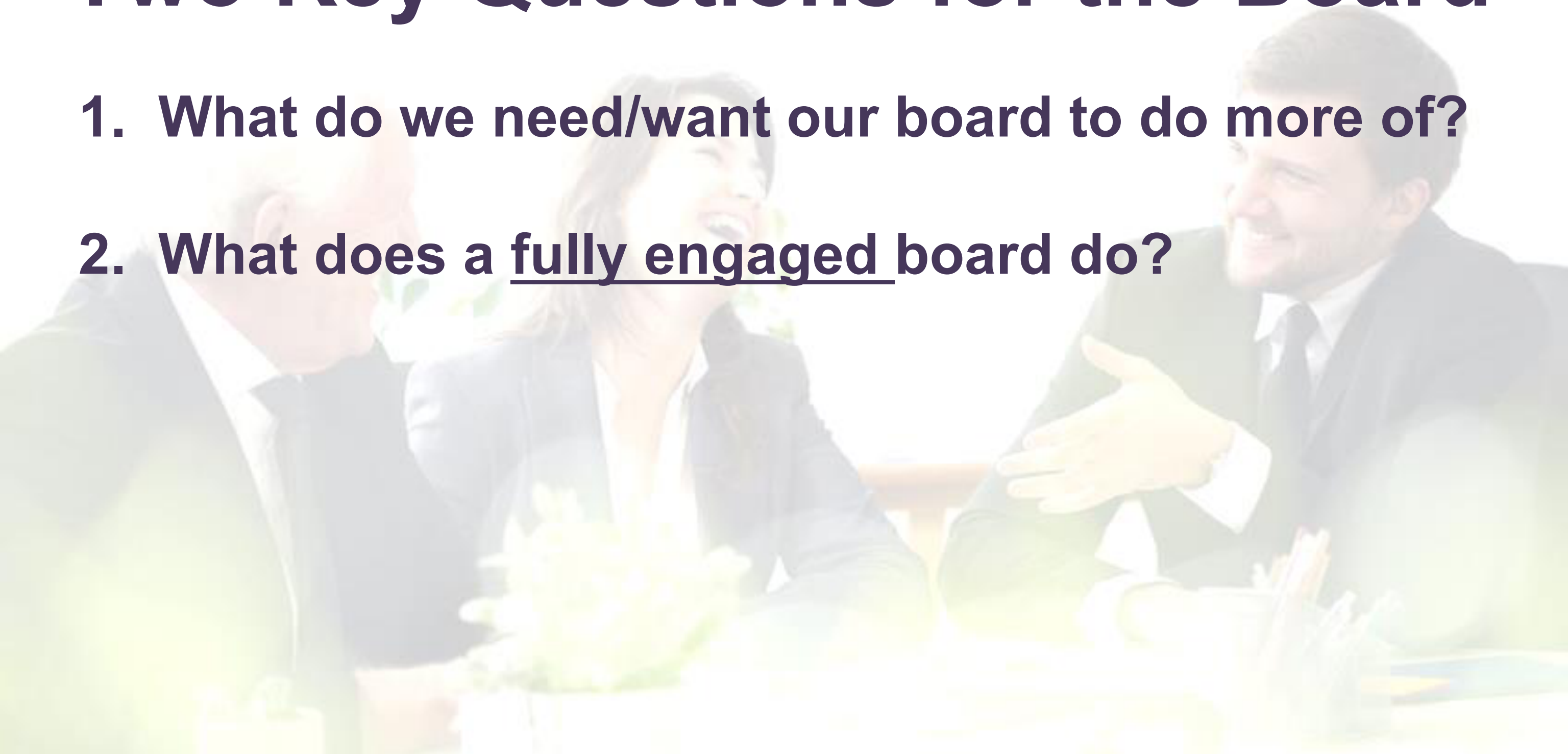


Two Key Questions



Two Key Questions for the Board

1. What do we need/want our board to do more of?
2. What does a fully engaged board do?



What Did You Learn?

What Will You Do Differently?



Resources & Staying Connected



Lori L. Jacobwith
*Master Storyteller & Fundraising
Culture Change Expert*



Lori Jacobwith – Ignited Fundraising



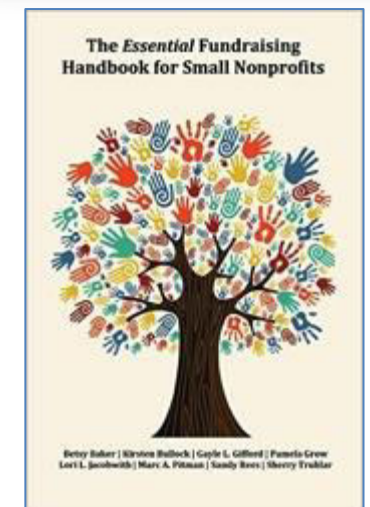
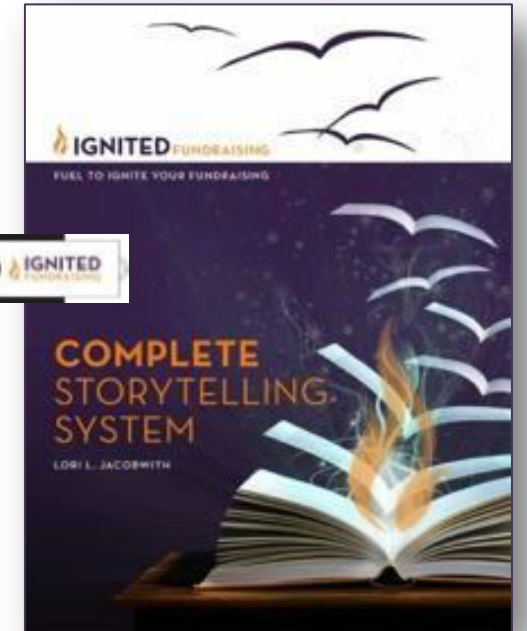
@LJacobwith



Fire Starters Blog

Free Resources

IgnitedFundraising.com



To Talk With Me:

<http://bit.ly/StrategizeWithLori>

Additional Resources



Steve Bowman, Conscious Governance

<http://consciousgovernance.com/blog/>

Twitter: [@consciousgovern](https://twitter.com/consciousgovern)



Debra Beck, Ed.D., Laramie Board Learning Project

<http://www.boardlearning.org/>

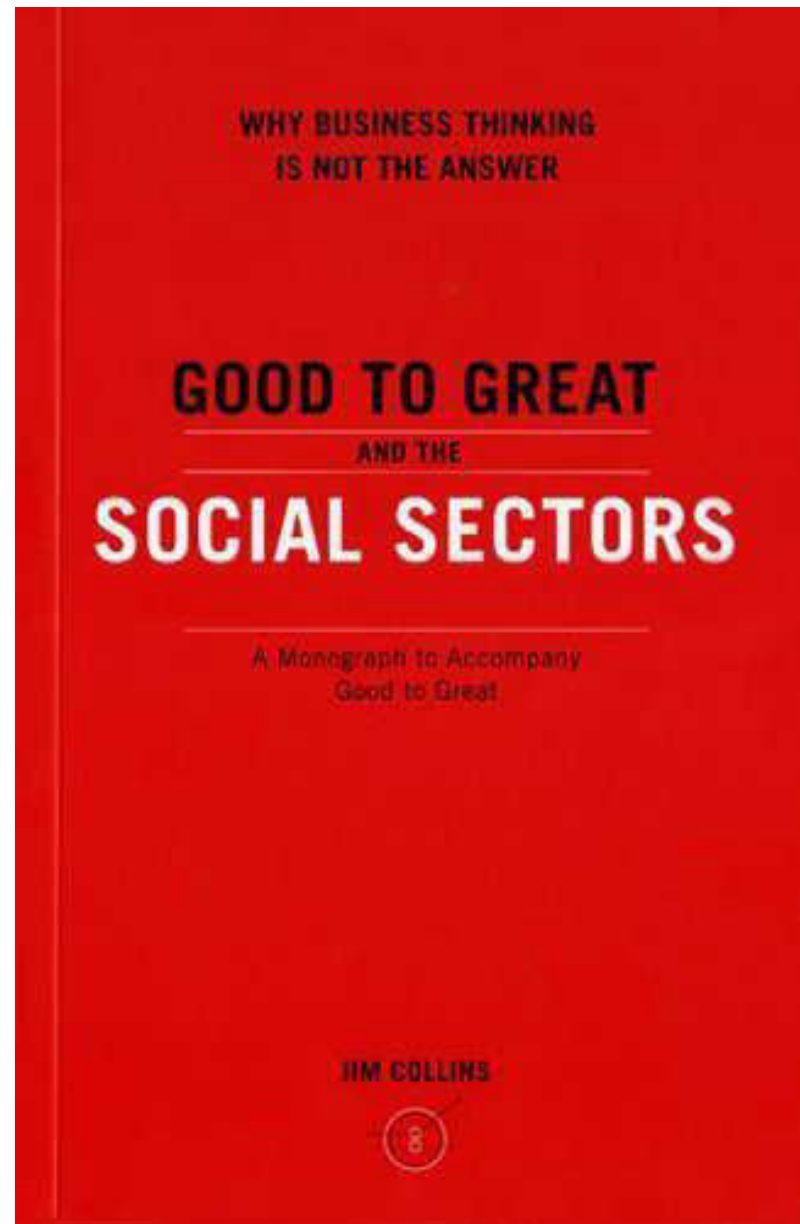
Twitter: [@npmaven](https://twitter.com/npmaven)



Fire Starters

Boldness, Clarity & Wisdom for Fundraising Professionals

<http://bit.ly/BoardScavengerHunt>



“Greatness is not a function of circumstance. Greatness, it turns out, is largely a matter of conscious choice and discipline.”

Thank You!

Expanding Your Reach
Engaging Your Board

 **IGNITED**
FUNDRAISING


WE RISE TOGETHER
2018 NEUAC Conference

