From Stuck to Success

Fundraising Tools to Help Your Board Get it Done

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Agenda & Goals

This session will focus on three major fundraising challenges facing nonprofit boards and will identify tools and strategies to overcome them and set your board up for success.

Diversity

Success follows when we start treating our board as a team of individuals, instead of a collective.

Expectations

Are your board members doing what you need them to do? Do they know what you need them to do?

Purpose

Are your board members ready to talk about why the mission matters? Or are they stuck repeating facts?



About Us

- Jennifer Li Dotson 李麗玲 (she/her)
- Strategic Advisor, AI in Fundraising
- US Commission for Civil Rights, Committee on the Status of Women & the Committee on Refugee and Immigrant Affairs.
- National Kidney Foundation, American Red Cross, Muscular Dystrophy Association, and Mothers Against Drunk Driving.

About Us



- Chris Baiocchi, MAOL, CFRE (he/him)
- Background in journalism, corporate communications, and fundraising
- Help nonprofits Align & Accelerate their fundraising to raise more - and do more - for their mission.

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Some Mindsets For Today

Fitness vs. Construction
Curiosity vs. Expertise
Inviting vs. Demanding
Strategy vs. Tradition





*The goal is not a "perfect" organization - but an **improving** one.*

The Problem(s)

"Many boards were either unwilling or unable to play an active role in fundraising."

- *Solving the Mystery of Board Engagement and Fundraising* - Stanford Social Innovation Review

"Board engagement is described as 'the single most important health measure of a nonprofit board.'"

- *3rd Annual Nonprofit Board Engagement Survey Report* - Boardable

Common issues:

- Board members don't fundraise
- Staff struggles with board fundraising engagement

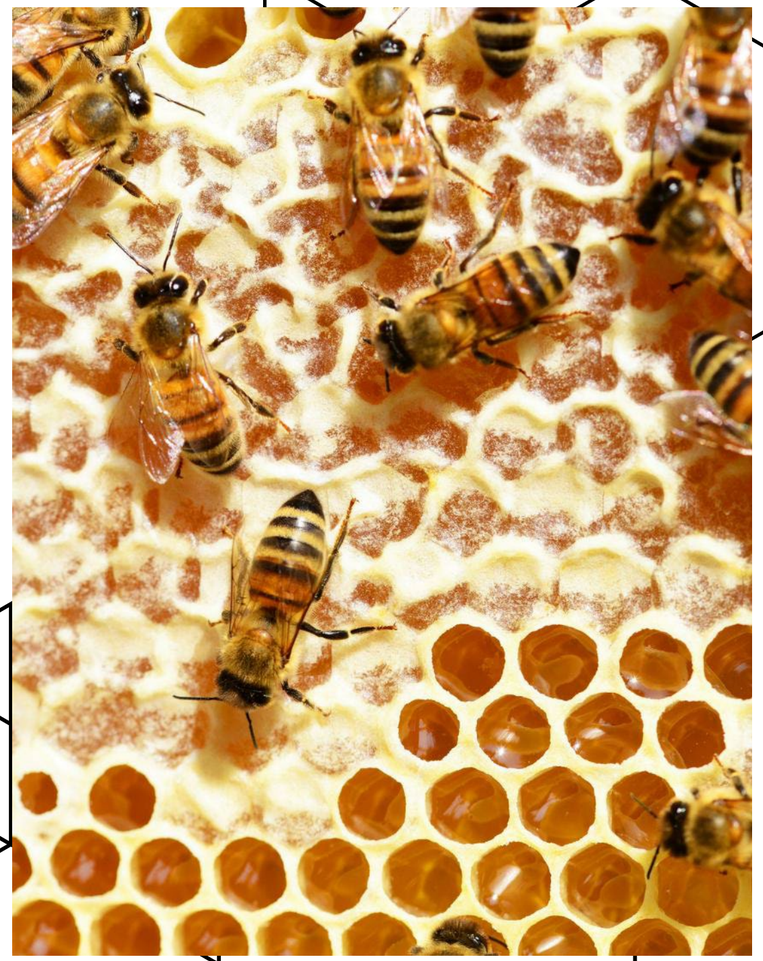


Who?

“My board doesn’t fundraise.”

Some nonprofits treat the board as a collective, often ignoring the individual skills, interests, and contributions of members.

By treating the group as a single system, we limit our ability to communicate with, learn from, and inspire members.

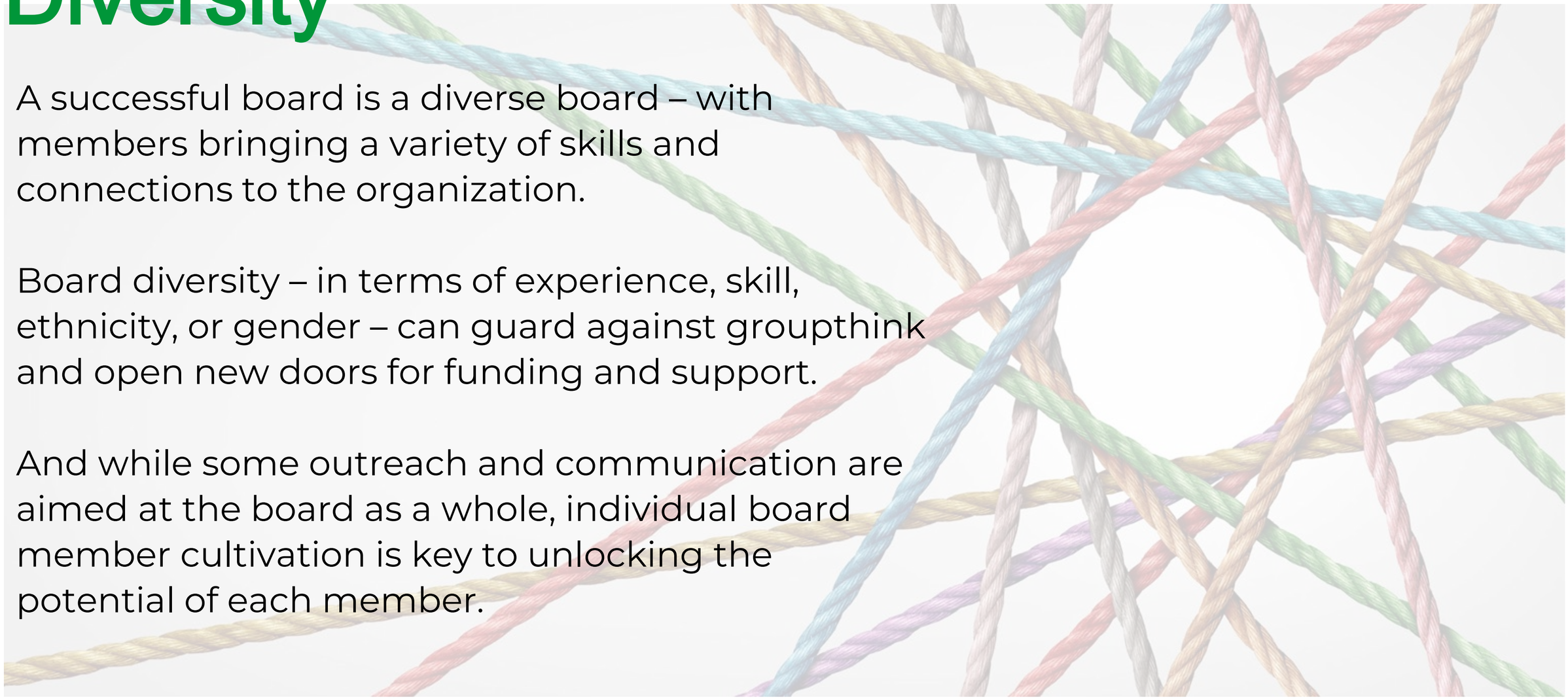


Diversity

A successful board is a diverse board – with members bringing a variety of skills and connections to the organization.

Board diversity – in terms of experience, skill, ethnicity, or gender – can guard against groupthink and open new doors for funding and support.

And while some outreach and communication are aimed at the board as a whole, individual board member cultivation is key to unlocking the potential of each member.



The Power of Networks



- The secret power of every board member
  - Remember - not about capacity
  - Remember - not about gifts
- Sharing values, inviting people to the party
- Types of networks:
  - Employers (current and former)
  - Schools
  - Friends
  - Faith & community groups
  - Sports & hobbies
  - Professional associations

Tools & Strategies

Supplement board-wide communications with personalized outreach to members.

Hold regular meetings with board members to learn about their connection to the cause and to talk about networks & connections.



1:1 Meeting Suggestions

Consider questions such as …

- Why did you join our board?
- What has brought you joy lately?
- Networking mapping prompts: What was the last event or meeting you attended?
- What did you like about the last board (or committee) meeting?
- What could we improve?
- What are some of the challenges you are facing at work?
- **What other philanthropic causes do you support? What drew you to that mission?**
- If you had to pick one element of our mission to share with others, what would it be (and why)?

Quick Poll

How often do you meet with individual board members?

A: Always - I have regular meetings.

B: Sometimes - when it comes up.

C: Isn't the board meeting enough?



What?

Oftentimes, board members don’t know what staff need them to do.

And staff members don’t always know what a board member wants to do to help the mission.

And in that confusion, both staff and board members are left feeling frustrated.



Expectations

Achieving goals – or fulfilling a vision – is next to impossible without **shared expectations** .

Clear expectations for board members, committee members, and staff are key.



Tools & Strategies

Board expectations should be spelled out in recruitment and onboarding materials.

The expectations document can be used as the basis for a board self-evaluation process.



Expectations & Evaluation

A board member expectations document can become a board member self-evaluation tool. For example …

- Attend X board meetings / year
- Attend X events / year
- Make a meaningful, personal gift to the organization each year

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Please rate your performance on the following board expectations on a scale of 1 -5.

- *Attend X board meetings / year*

1	2	3	4	5
Unsatisfactory	Needs Improvement	Meets Expectations	Exceeds Expectations	Exceptional

Quick Poll

Do your board members know how they can engage in fundraising?

A: Absolutely!

B: Sometimes.

C: Absolutely never.



Why?

Once upon a time, a nonprofit board was a way to gather wealthy individuals to support the organization.

These wealthy individuals brought their expertise to bear on multiple fronts—acting more like owners of the organization than stewards of a mission.

A focus on expertise also led many boards to tie fundraising to facts & figures.



Why Why Matters



- Default nonprofit language starts to answer “what” and “how” questions
- “Why” answers start to connect with values and emotions
- Emotions - and stories that touch on emotion - drive us to make decisions
- *“By why I mean what is your purpose, cause, or belief? Why does your company exist? Why do you get out of be every morning? And why should anyone care?”*
  - Simon Sinek

Tools & Strategies

- A 3-Piece Fundraising Toolkit:
  - A personal “why“ story
  - A staff connection
  - A next step or on-ramp



The Wallet Card



- What they say they need:
  - The Wallet Card
  - Facts & Figures
  - Impact Numbers
  - The Elevator Pitch

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- What they really need:
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  - A staff connection
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Connections in Action



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- A next step or on-ramp
  - Continues the conversation
  - Provides additional info
  - A natural progression



Quick Poll

Have you asked your board members to share their personal “why” stories?

A: Yes- it’s a regular part of our meetings.

B: Sometimes - but not regularly.

C: No - I haven’t asked and they haven’t shared.



Get Your Toolkit

- Agenda for 1:1 meetings with board members
- Expectation/Evaluation documents
- 3 Piece Fundraising Toolkit

Stay in Touch



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Questions?
Comments?
Takeaways?