



# Philanthropic Leadership: Engaging Board Members as Fundraising Ambassadors

Thursday, March 16, 2023

  
FUNDRAISING

# PRESENTER



## Elizabeth Abel

**Senior Vice President, CCS Fundraising**  
Instructor, University of Pennsylvania School of Social Policy & Practice

“My mission is to *educate and empower nonprofit leaders* with the knowledge and tools to *grow their fundraising revenue* and amplify their *impact.*”

# ABOUT CCS FUNDRAISING

CCS is a global consulting firm that provides fundraising, development services, and consulting to nonprofit organizations.



600+ nonprofit organizations served annually



\$11 Billion In campaigns under management



500+ Professional staff members



250+ Campaigns launched In 2022



18 Offices Around the Globe



# A SELECTION OF CCS EXPERIENCE



## TODAY'S SESSION

1. Key Trends in Philanthropy
2. Role of the Board in Advancing Fundraising Activity
3. Recruiting & Engaging Diverse Board Members
4. Board Engagement Strategies & Case Studies
5. Q&A

# OUR GOALS

1

Understand the **role of the board** in elevating an organization's fundraising program

2

Develop **action-oriented strategies** to recruit and engage **diverse board members** in fundraising activity

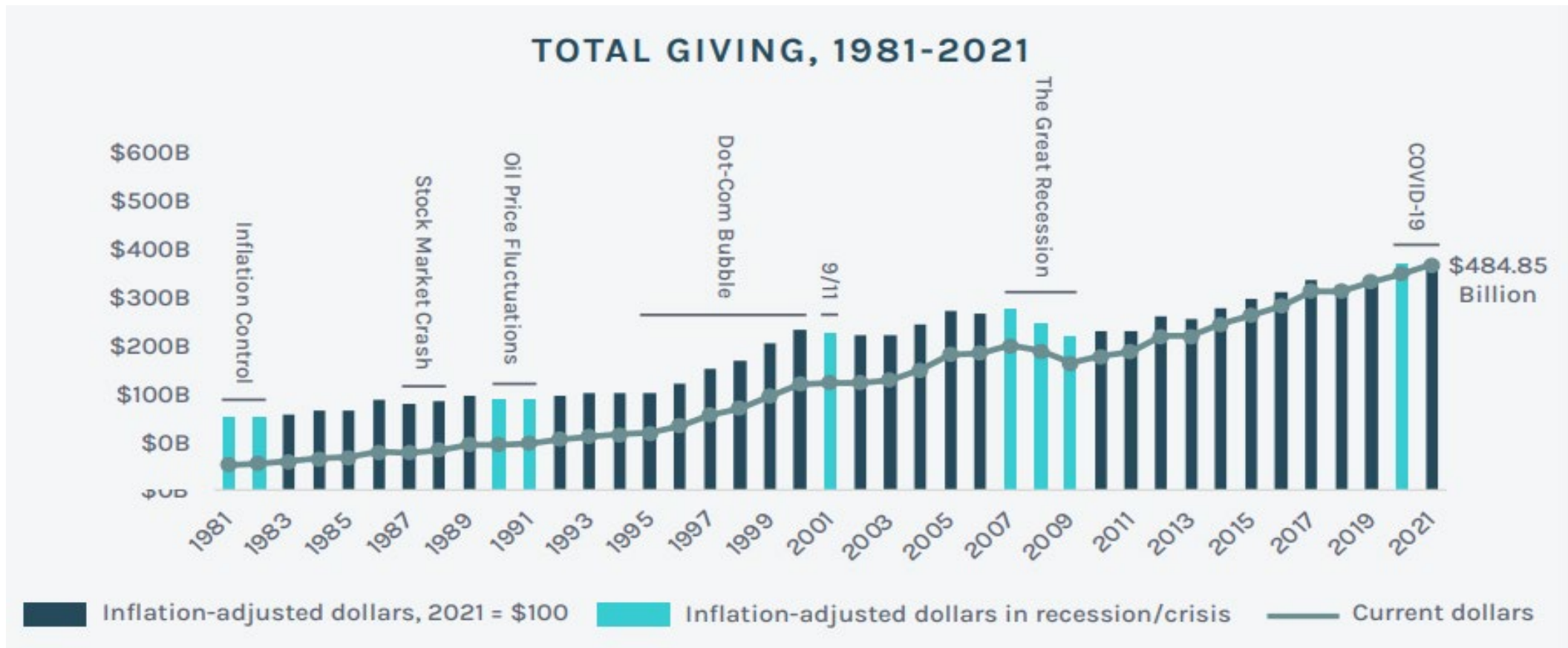
3

Discuss **best practices** that organizations can apply to leverage **board members as fundraising ambassadors**

# KEY TRENDS IN PHILANTHROPY

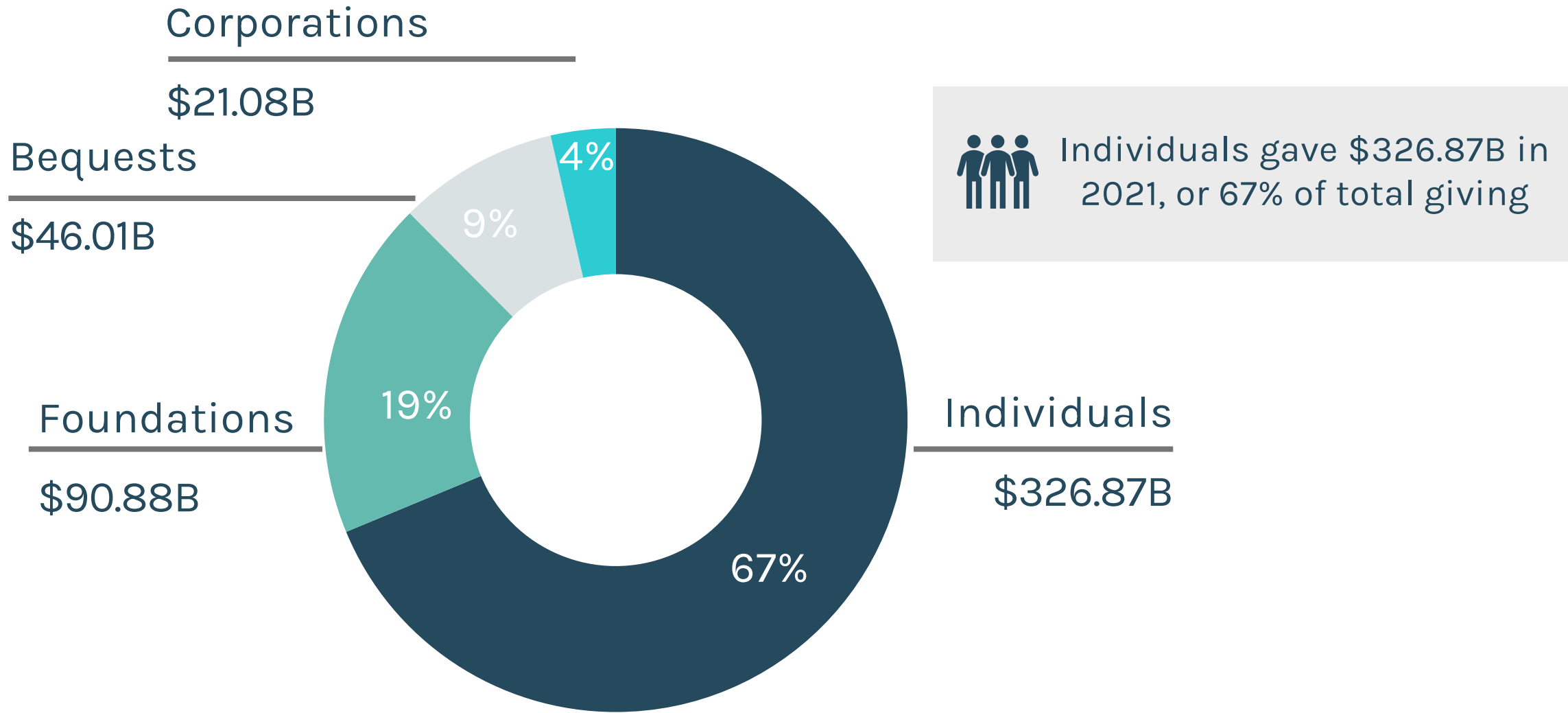
# PHILANTHROPY IS RESPONSIVE & RESILIENT

Giving USA estimates that charitable giving in the U.S. reached **\$484.85** billion in 2021. This represents a 7% increase since 2019.





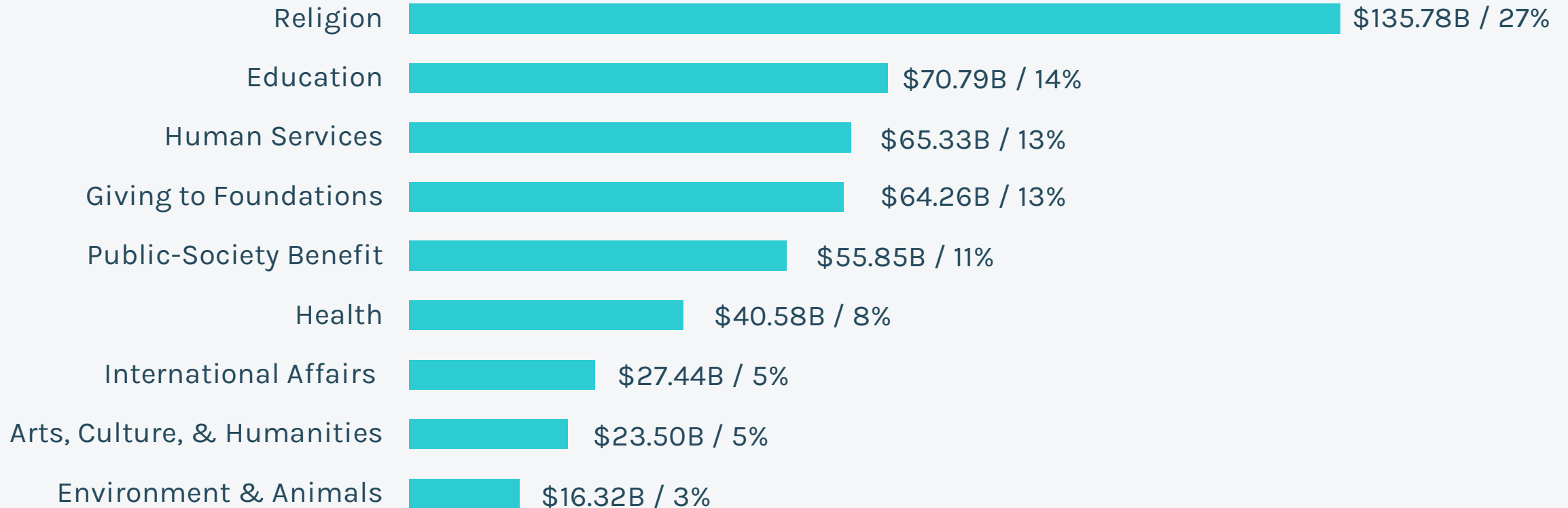
# INDIVIDUALS CONTINUE TO DRIVE GIVING



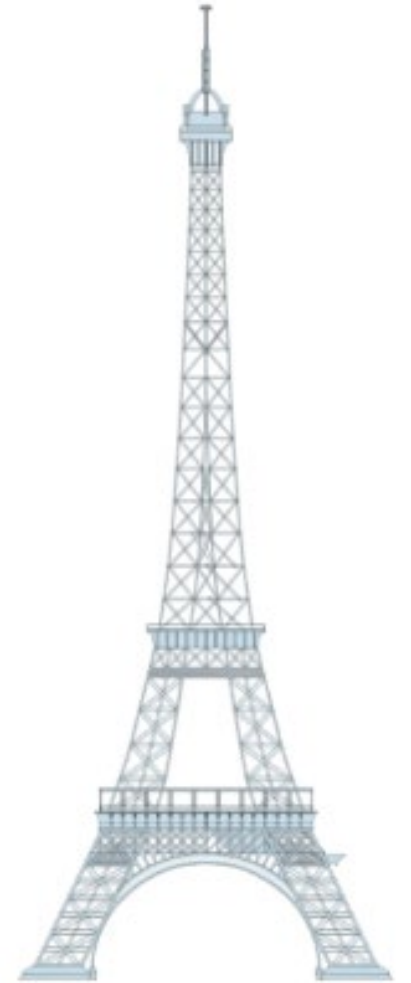
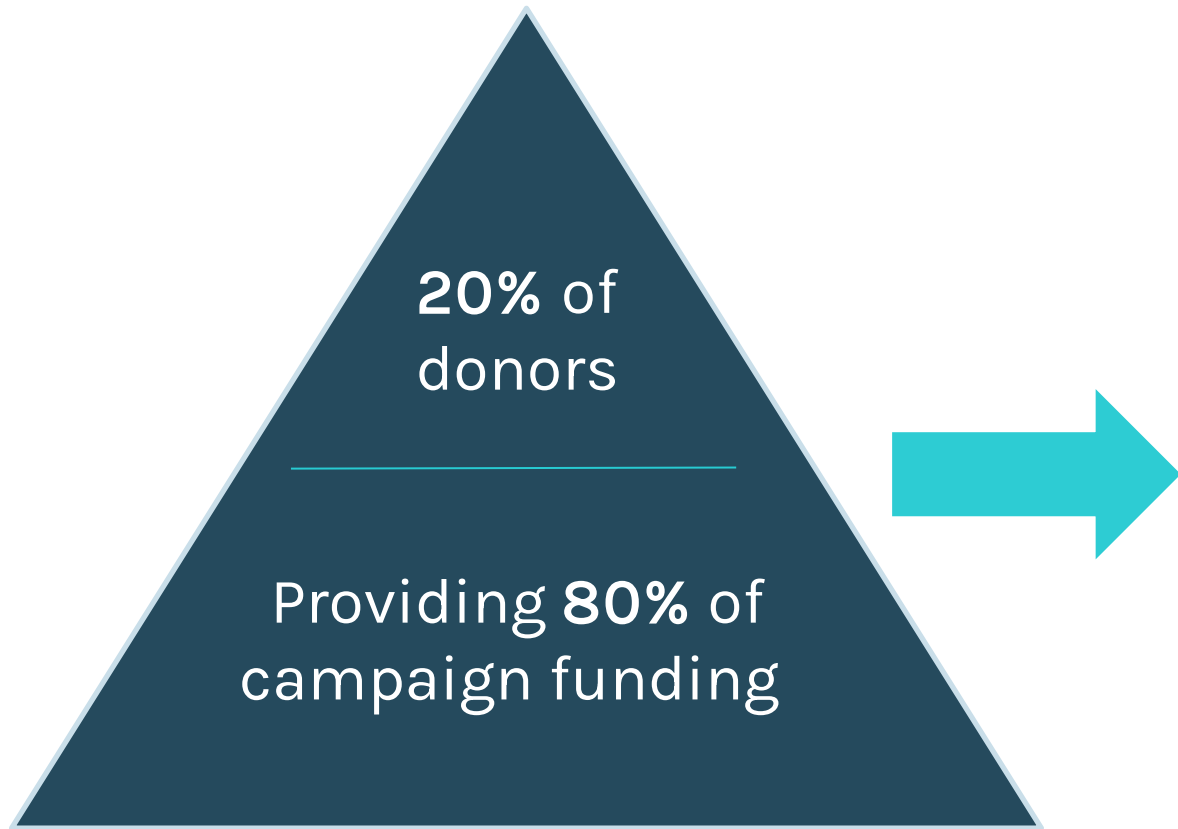
# GIVING IS INCREASING ACROSS SECTORS

The top sector recipient of charitable dollars is the religious sector, followed by education.

## GIVING BY RECIPIENT TYPE



# "DONORS DOWN / DOLLARS UP"



# THE RELATIONSHIP BETWEEN VOLUNTEERING & DONATING

Meaningful volunteer opportunities can build bonds that strengthen and enrich the donor-nonprofit relationship.

**62%**  
of charitable donors  
are also **recent  
volunteers**

**39%**  
of donors support a  
nonprofit by  
volunteering **before**  
they make financial  
donations

**33%**  
of millennials say they  
give **more to the  
nonprofit they  
volunteer with**



# The Role Of The Board In Advancing Fundraising Activity

# THE ROLE OF A NONPROFIT BOARD

## STRATEGY

To give the organization **direction** and establish its vision, mission, and values

## OVERSIGHT

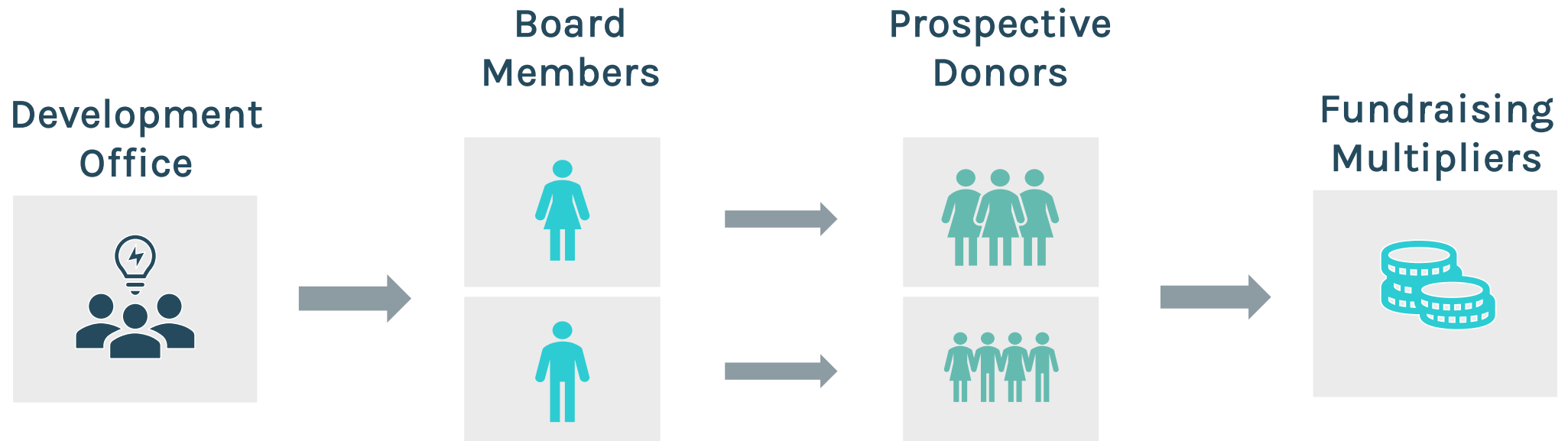
To provide oversight, especially in **financial matters**, to ensure accountability

## PARTICIPATION

To ensure the organization has the **resources** it needs to do its work

# FUNDRAISING MULTIPLIERS

- Natural storytellers and advocates
- Bring a diverse set of experiences, skills, and talents
  - Access to potential avenues of new support
  - Multipliers of your fundraising activity



# SETTING FUNDRAISING EXPECTATIONS

When fundraising expectations are clearly articulated during Board recruitment:

**52%** of CEOs report that their boards are actively engaged in the organization's fundraising efforts.

When fundraising expectations are *not* clearly articulated during Board recruitment:

**Only 12%** of CEOs report that their boards are actively engaged in the organization's fundraising efforts.



# WHAT DONORS WANT TO KNOW ABOUT YOUR BOARD

Support mission

Personal involvement

Diversity and inclusiveness

Financial support at 100% participation

Solid partnership between Board and administration

# Recruiting & Engaging Diverse Board Members

# CURRENT CHALLENGES: BOARD COMPOSITION & DEI

- The percentage of people of color on boards increased from 16% in 2017 to 22% in 2019.
- However, nonprofit boards are still far from representing the communities they serve.
- Compounded by traditional board recruitment practices, where boards identify potential new members through existing networks.

---

**82%** Of chief executives say **racial diversity is important** to external leadership

---

---

**70%** Of that group is **dissatisfied with board's racial composition**

---

---

**50%** Have **aligned board recruitment practices with diversity goals**

---

# THE BENEFITS OF BOARD DIVERSITY

A Board's level of diversity affects the organization's programming, fundraising, and **overall impact**.

Expand donor base to reach a **broader audience**

Enhance **standing with current funders and donors**

Attract and retain **top talent for the board**

Cultivate **trust and confidence** with the community served

Enhance **standing with the general public**

Understand how to **best serve the community**



# TURNING INSIGHT INTO ACTION

By becoming more diverse and inclusive, boards will **amplify their fundraising activity**. In turn, they will be **more effective in fulfilling their mission**, delivering their programs, and impacting the communities they serve.

**1**

Reflect on the importance of diversity to your **board's work**—particularly fundraising

**2**

**Recruit** for board diversity in a strategic & respectful way

**3**

Commit to building an inclusive and welcoming **board culture**

**4**

Consider the level of depth of your **DEI practices** & assess how you can go deeper

**5**

Dedicate time for **continuous learning & growth**

# CHARACTERISTICS OF EFFECTIVE BOARD MEMBERS



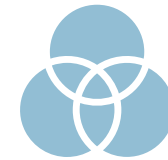
## Advocate

Respected community leader and strong communicator



## Donor

A generous stakeholder who is personally philanthropic



## Perspective

Has an inspiring personal story



## Connector

Has access and is willing to make introductions to potential supporters



## Partner

Collaborative and passionate about the mission



## Steward

Can commit time to building and maintaining relationships

# ENGAGING BOARD MEMBERS IN FUNDRAISING

Champion the  
Vision

Build Meaningful  
Relationships

Activate Personal  
Networks

Support  
Solicitation &  
Stewardship  
Activity



# CHAMPION THE VISION

1

Generate enthusiasm and momentum around the **case for support** - *talk about the organization*

2

Speak on behalf of the organization - formally, at events, and informally, with friends

3

Share **personal story**; share why they give

4

Allow use of name associated with your organization



# BUILD MEANINGFUL RELATIONSHIPS

1

Identify prospective donors; assist in developing engagement strategies (“**prospecting sessions**”)

2

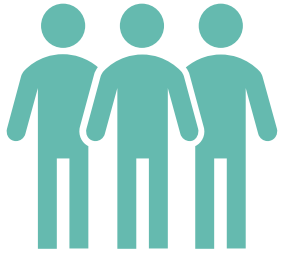
Facilitate **personal introductions** to professional leadership; help with follow up

3

Participate in select **donor meetings**

4

Engage with social media (post, tweet, follow)



# ACTIVATE PERSONAL NETWORKS

1

Invite prospective donors to **meet** to learn more about the organization

2

Host a **parlor meeting** in home or business (breakfast, cocktails)

3

Attend **events** (gala, annual programming); invite friends and prospects to an event



# SUPPORT SOLICITATION & STEWARDSHIP ACTIVITY

1

Make a **meaningful gift**  
to the organization

2

Offer **guidance** on the  
right gift strategies or  
materials to present to a  
donor

3

Reinforce gift requests  
("join me")

4

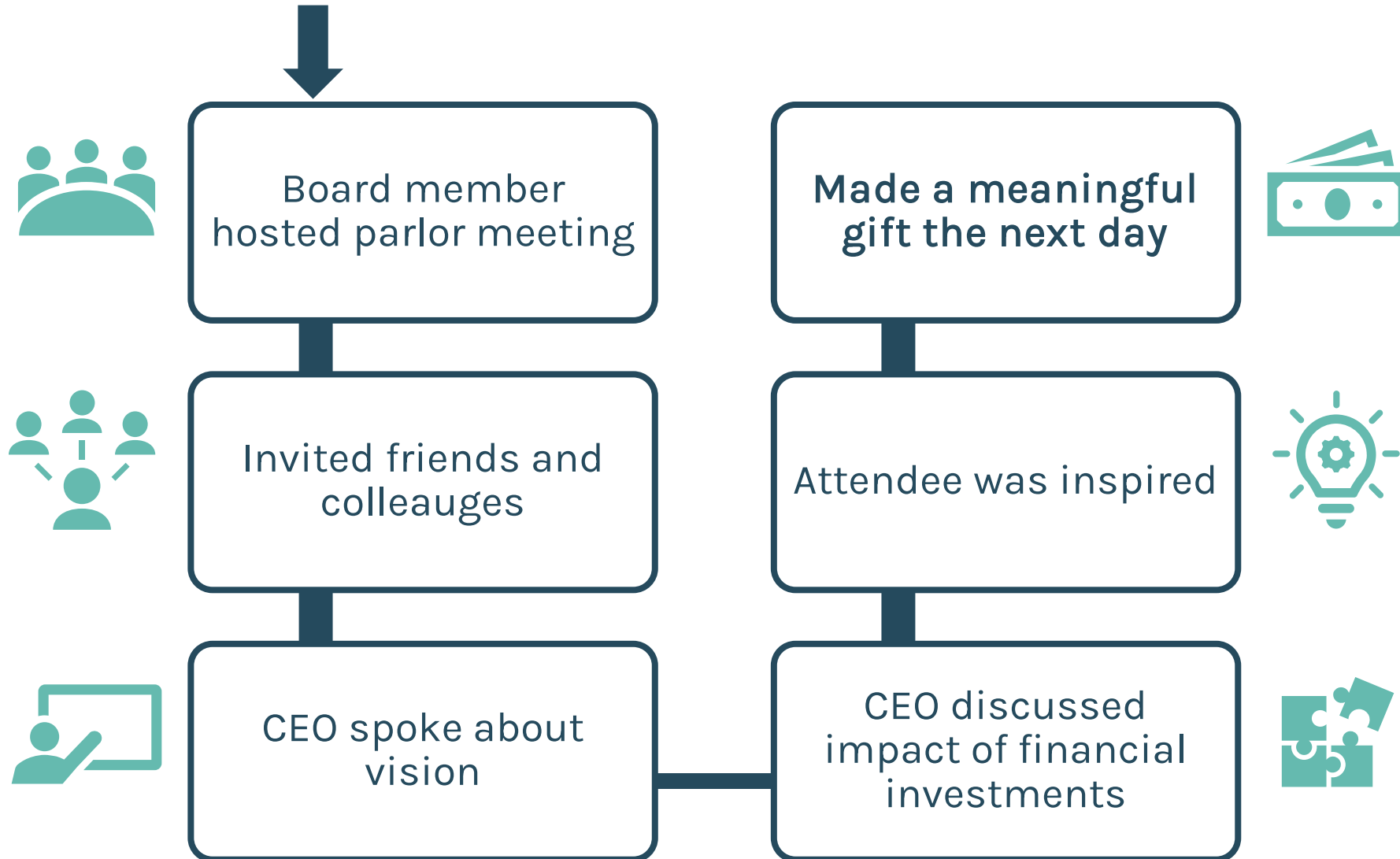
Support **stewardship  
activity** (thank you  
calls/emails)

# Board Engagement Strategies & Case Studies



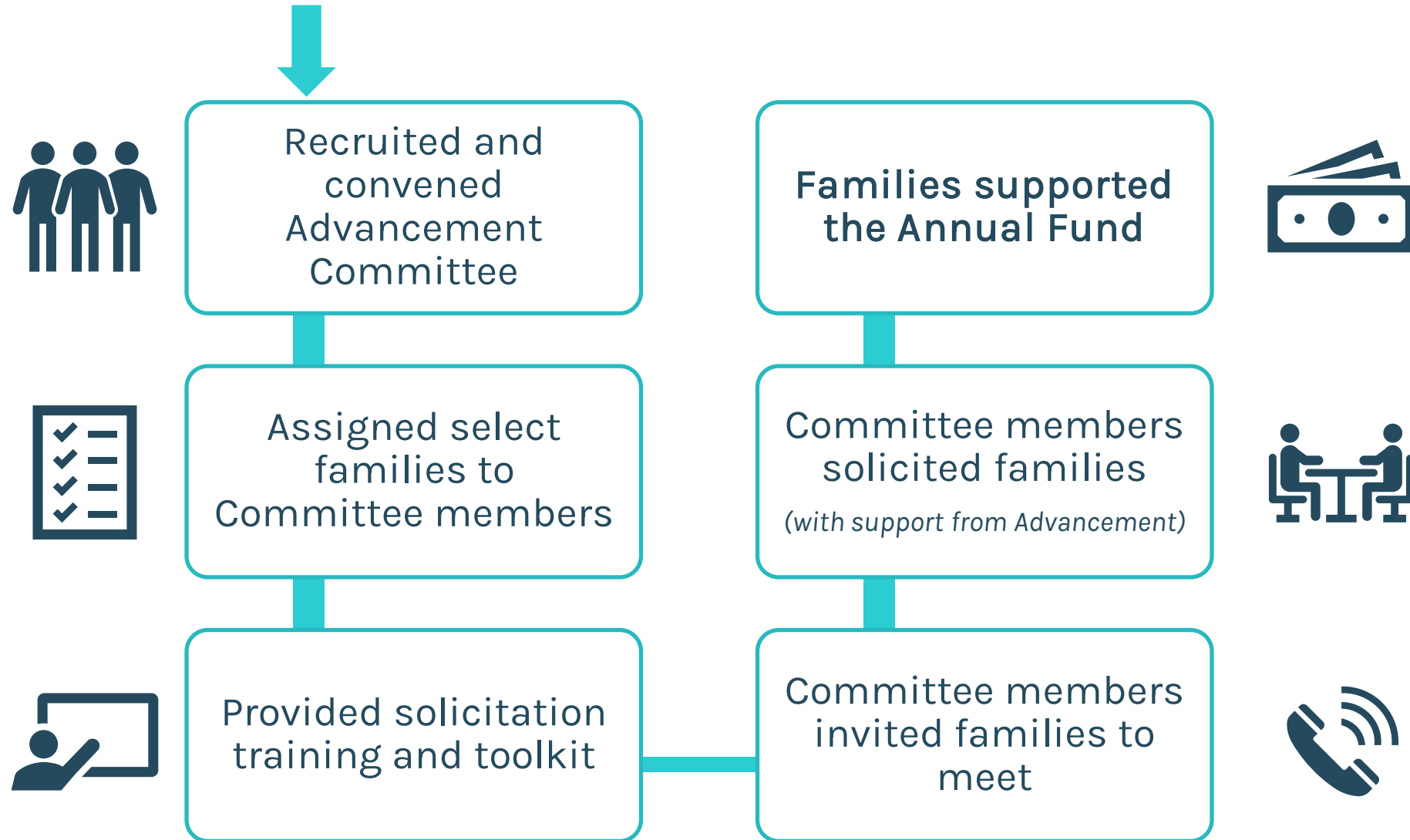
# CASE STUDY: PARLOR MEETING

At an Advocacy Organization



# CASE STUDY: PEER-TO-PEER SOLICITATIONS

At an Independent School



# EMPOWERING YOUR FUNDRAISING AMBASSADORS



Clear  
Expectations



Fundraising  
Toolkit



Educational  
Opportunities



**Recognize Board Members for Their  
Leadership, Time, Energy & Generosity!**



# THANK YOU | Q&A

Let's stay connected!

Elizabeth Abel  
CCS Fundraising

✉ [eabel@ccsfundraising.com](mailto:eabel@ccsfundraising.com)

📷 @ElizabethBerniAbel

🌐 <https://www.linkedin.com/in/elizabethabel>

