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HOW TO KEEP YOUR BOARD ENGAGED IN RESOURCE DEVELOPMENT ALL YEAR

BY SABRINA WALKER HERNANDEZ

ABOUT ME

- I studied Political Science and Public Administration.
- I obtained a Nonprofit Management Certification from Harvard Business School.
- For the last 25 years I have worked in the nonprofit industry in direct services, operations and executive leadership.
- In 2018 I was diagnosed with cancer and felt that I needed to retire.
- Since I have been helping small nonprofits staff and board build relationships that converts into more donations.



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WHAT I DO

- Workshops
- Board Retreats
- Webinars
- Coaching
- Consulting



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THE GOAL OF THIS PRESENTATION

1

Understand the role of the board in the resource development & fundraising

2

Learn how to engage the board in each of these roles

3

Know how staff can support the Board in resource development & fundraising

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ROLE OF BOARD MEMBERS

1. Give Generously

2. Be an Advocate

3. Participate in Resource

Development & Fundraising



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1. GIVE GENEROUSLY

Give Generously - Make Their Own Personal Gift

- It's too hard to ask someone else to do something you are not willing to do
- It shows you are committed
- It will make you a much better fundraiser

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HOW TO FACILITATE BOARD GIVING

- RECRUITMENT PROCESS
- YEARLY INDIVIDUAL MEETINGS WITH BOARD MEMBERS
- ANNUAL COMMITMENT FORM
- ACCOUNTABILITY PROCESS

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2. BE AN ADVOCATE

- Share their personal story
- Spend time in the nonprofit
- Elevator Speech

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**3. PARTICIPATE
IN RESOURCE
DEVELOPMENT &
FUNDRAISING**

TO BOARD MEMBERS, FUNDRAISING IS...



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SOME OF THE THINGS BOARD MEMBERS TELL THEMSELVES



“ They think it’s going to feel bad, like begging. ”

“ I don’t like to hear no! ”

“ I don’t like asking my friends or strangers for money. ”

“ I am uncomfortable asking for money. ”

“ I don’t know any rich people. ”

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Few if any board members join a board because it is a great opportunity to fund raise, yet almost all boards expect this of their members.

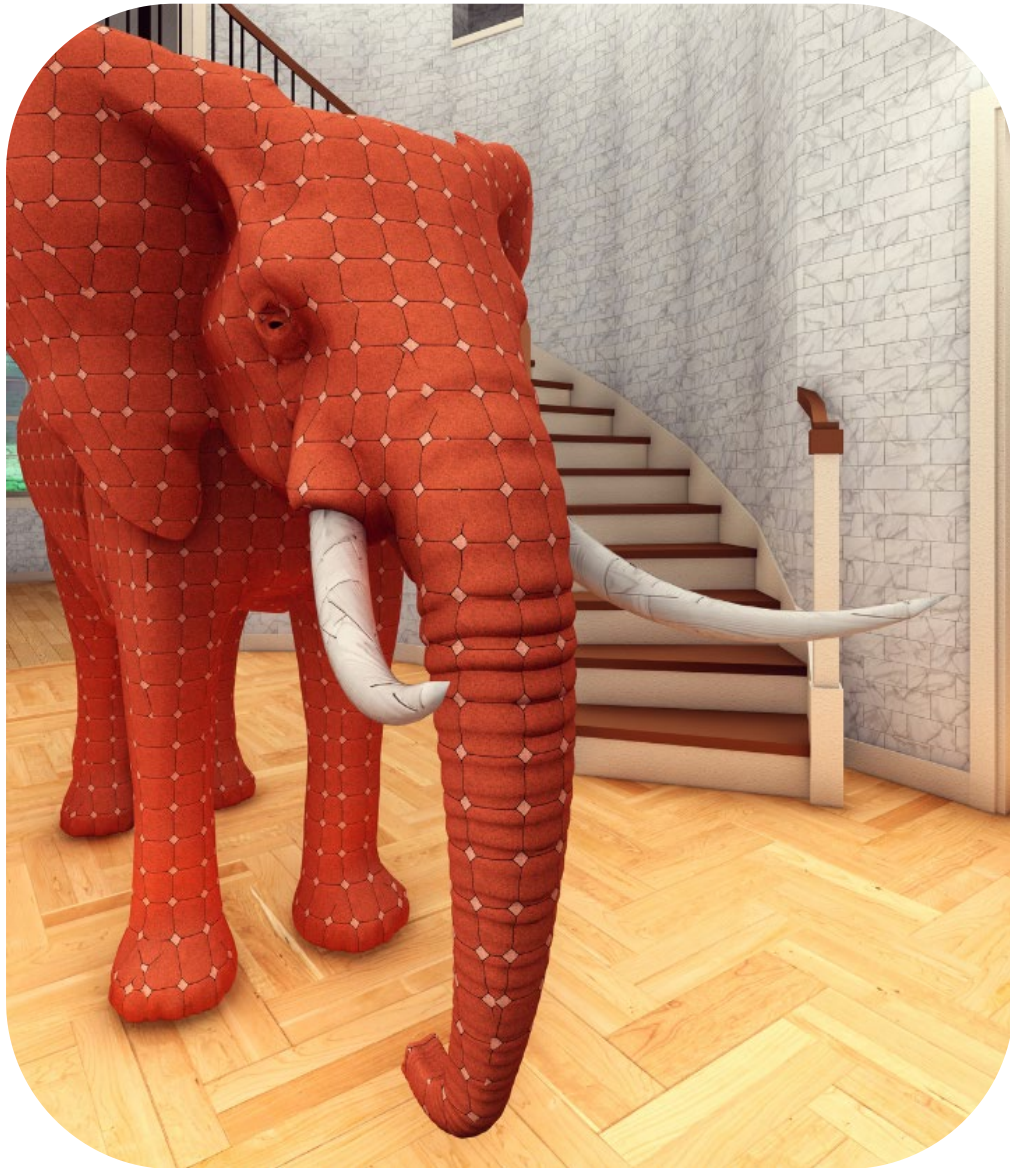
Where nonprofits fail their board members is in expecting great results with no training!



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You must educate the board and develop a strategic plan for their involvement. You can't just keep asking them to "solicit their lists" - it's not strategic and it does not motivate your board member or increase their willingness to be involved.

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**FUNDRAISING
& RESOURCE
DEVELOPMENT
IS MORE THAN
ASKING**



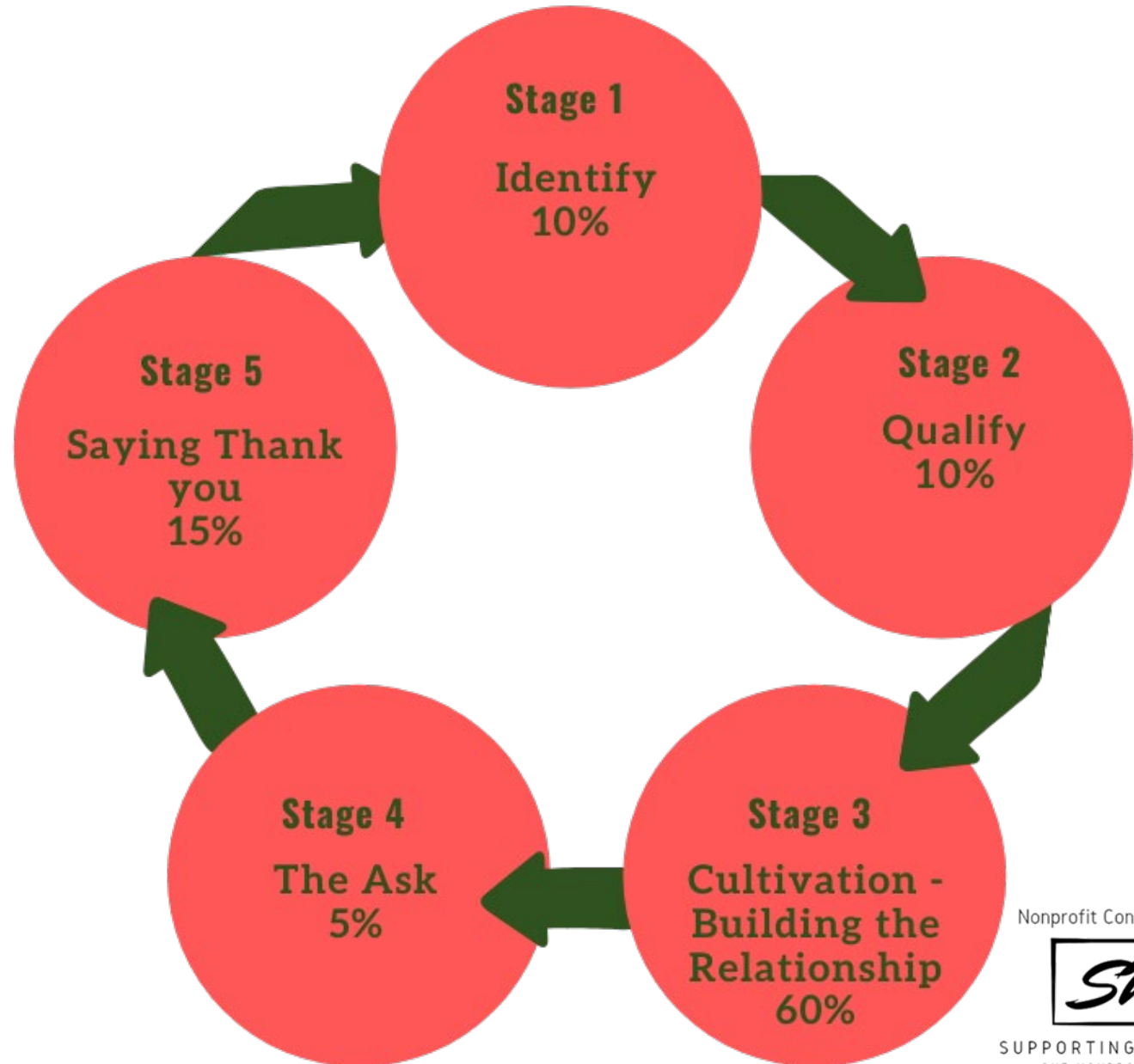
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FUND YOUR NONPROFIT

This is a visual representation of fundraising. It is not just about soliciting or asking for donations. There are many roles in the fundraising cycle, and each is equally important to raising money.



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Give them choices that tap into their strengths

Some participation is non-negotiable – **100% of your board members should be making a personally significant gift to the nonprofit.**

Understanding the fundraising process, you need to offer a range of various options to your board, and ones that play to their strengths.

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DOOR OPENER

BOARD MEMBERS CAN
PARTICIPATE IN THE
FUNDRAISING PROCESS BY
OPENING THE DOOR TO THE
EVENTUAL ASK.
(LIST GENERATOR)

- Identifying potential donors (prospects)
- Building relationships with prospects
- Generating interest in the organization
- Showing prospects what the organization is all about – history, programs, finances, etc.

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CULTIVATOR

**IT IS TRUE WHAT THEY SAY:
“PEOPLE GIVE TO PEOPLE.”
DONORS WANT TO TRUST AND
LIKE THE INDIVIDUALS AT THE
ORGANIZATIONS THEY
SUPPORT.**

(5 X 5 PLAN)

Cultivation is about building relationships before asking for money. They can connect the organization to cultivation by making personal contacts with prospects.

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**ASKER (SIDE
KICK – WING
MAN)**

Board members can contribute to fundraising efforts by accompanying staff members on face-to-face solicitations.

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THANKERS

**AN ORGANIZATION'S
FUNDRAISING
RESPONSIBILITIES ARE NOT
OVER ONCE IT HAS RECEIVED A
DONATION FROM A DONOR.**

The final stage of fundraising is stewardship—thanking the donor and maintaining a relationship that keeps the donor connected to the organization. Board members can:

- send donors a thank you card or make a thank you call
- let the donor know the gift was appreciated and that it made a difference to the organization.

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There is a way to engage board members' heart, mind, and passion for fundraising.

Gail Perry – Fired Up Fundraising Turn Board Passion into Action.

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CEO'S ROLE

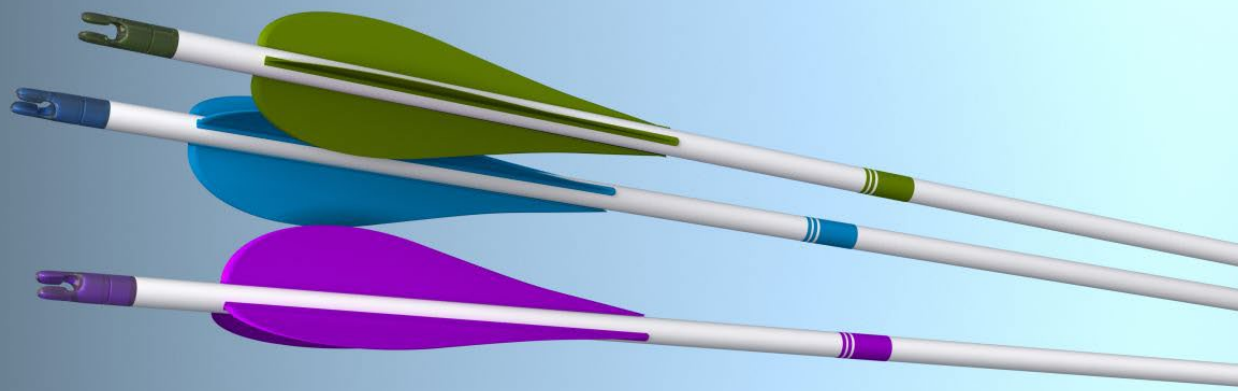
- Focus your Board
- Inspire your Board
- Ready your Board
- Engage you Board



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FOCUS YOUR BOARD

- Mission Moments
- Focus on Real Outcomes & Results

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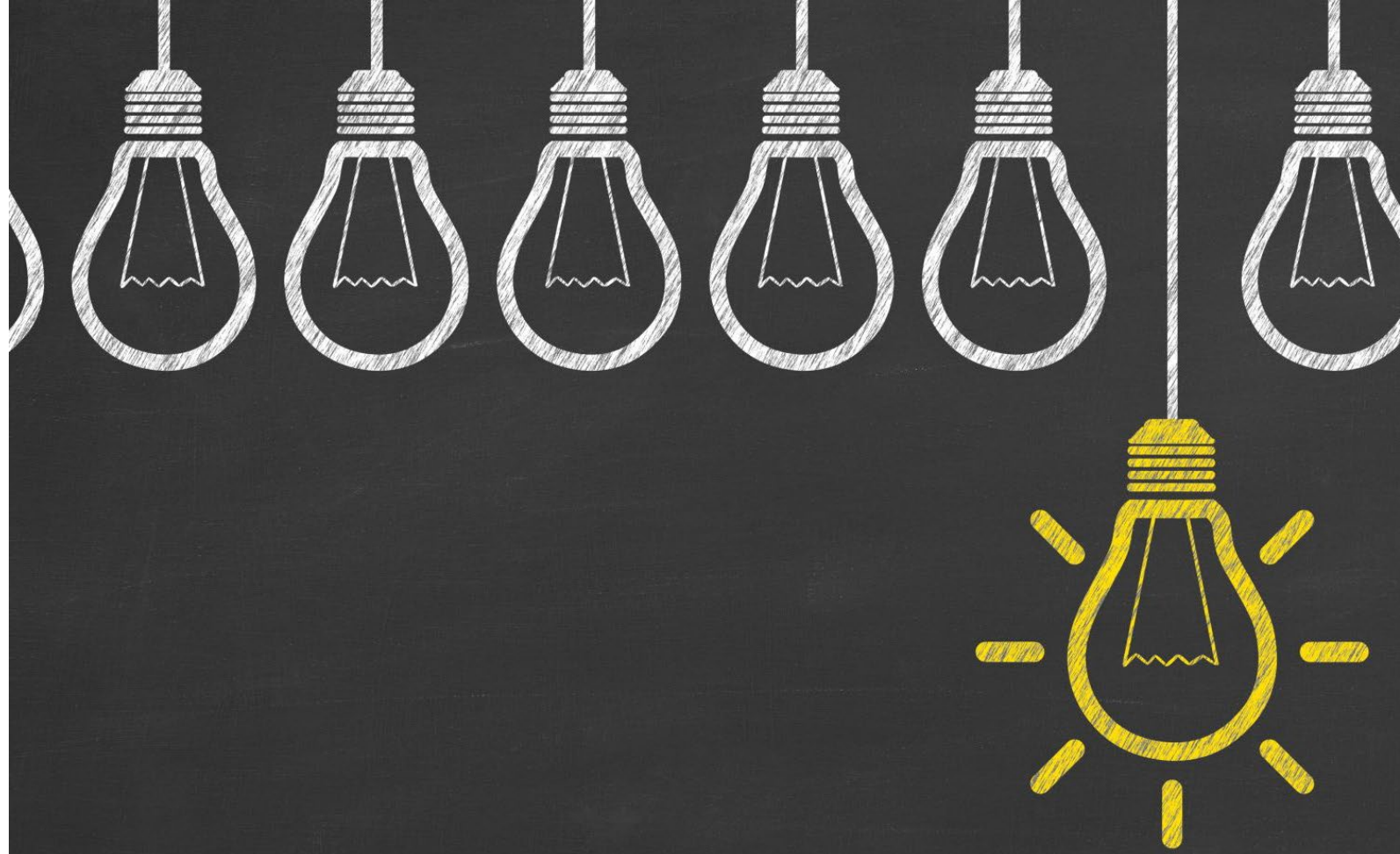


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INSPIRE YOUR BOARD



- Make Resource Development & Fundraising Fun
- Have a Plan



Helping children in need



SUPPORTING WORLD HOPE
THE WORTHINGTON TRUST



READY YOUR BOARD

- Proper Tools & Training
- Practice
- Educate them on the Donor Cycle

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ENGAGE YOUR BOARD

- Give your board members the appropriate fundraising & resource development role
- Create a Support Structure
- know our board's inventory

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What board members need from Staff so they can fundraise easily and effectively

If you want your board involved in fundraising, then you must help them.

Equip them: Provide board education and share client stories.

Make it easy: Give board member scripts, social media post, sample letters and emails.

Be accountable: Hold board members accountable for what they say they will do.

Be explicit: Be very explicit when recruiting board members about expectations and have a board expectation agreement in place.

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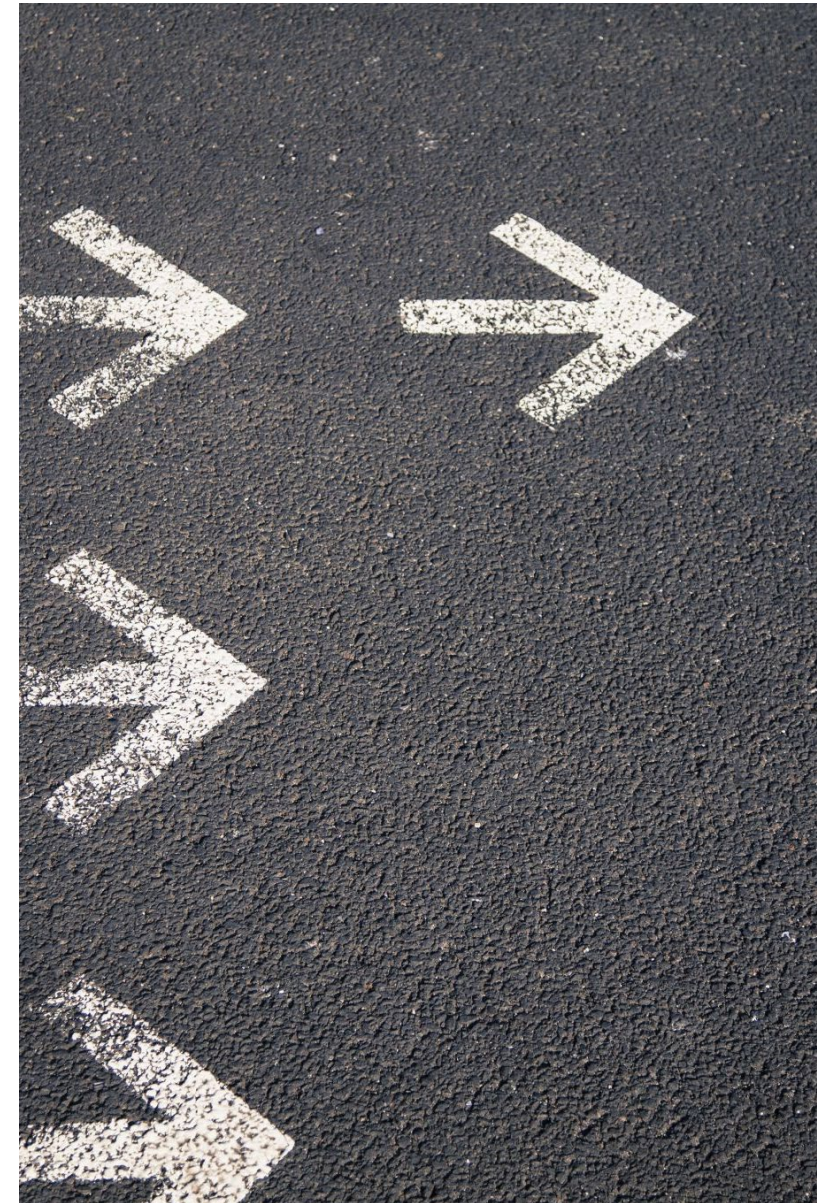
NOW WHAT?

HOW DO I START THE TRANSFORMATION?

Hold a board retreat, ask each board member to sign up personally for one or two of the critical fundraising-related jobs you may have brainstormed.

Make sure someone follows up with them; don't expect them to simply move forward without your nudge and support.

Make sure someone continues to follow up on each board member's progress!



Record all completed tasks in your CRM so you can continue to follow through, track and report on progress.





Report back to board members so they can see the fruits of their labor! If you ignore this important final step, board members won't feel as good as they could, or should, about having helped.

MISSION ACCOMPLISHED!

- Understand the role of the board in the resource development & Fundraising
- Learned how to engage the board in each of these roles
- Know how staff can support the Board in resource development & fundraising

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Q & A

Feel free to ask any questions related to the content of this webinar.

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