

NONPROFIT UNIVERSITY™

**Fundraising & Friendraising:
Engaging your Board to support
your mission**

Elizabeth Runkle

erunkle@gcn.org

GA CASA Annual Conference

Georgia Center for Nonprofits

Building thriving communities by helping nonprofits succeed

Membership

- Member-exclusive talks, workshops, roundtables, and events
- Publications: *Georgia Nonprofit NOW* quarterly magazine, monthly e-newsletter, and sector research
- NU+ThinkHR bundled subscription
- Advocacy

Nonprofit Consulting Group

- Strategic and Business Planning
- Leadership Development and Search
- Resource Development
- Board Development
- Performance Management and Measures

Nonprofit University

- Targeted coursework
- In-depth certificate series
- Executive leadership programs
- Custom trainings

Work for Good

- Online job board, connecting nonprofit talent to organizations around the country
- Hiring and career insights

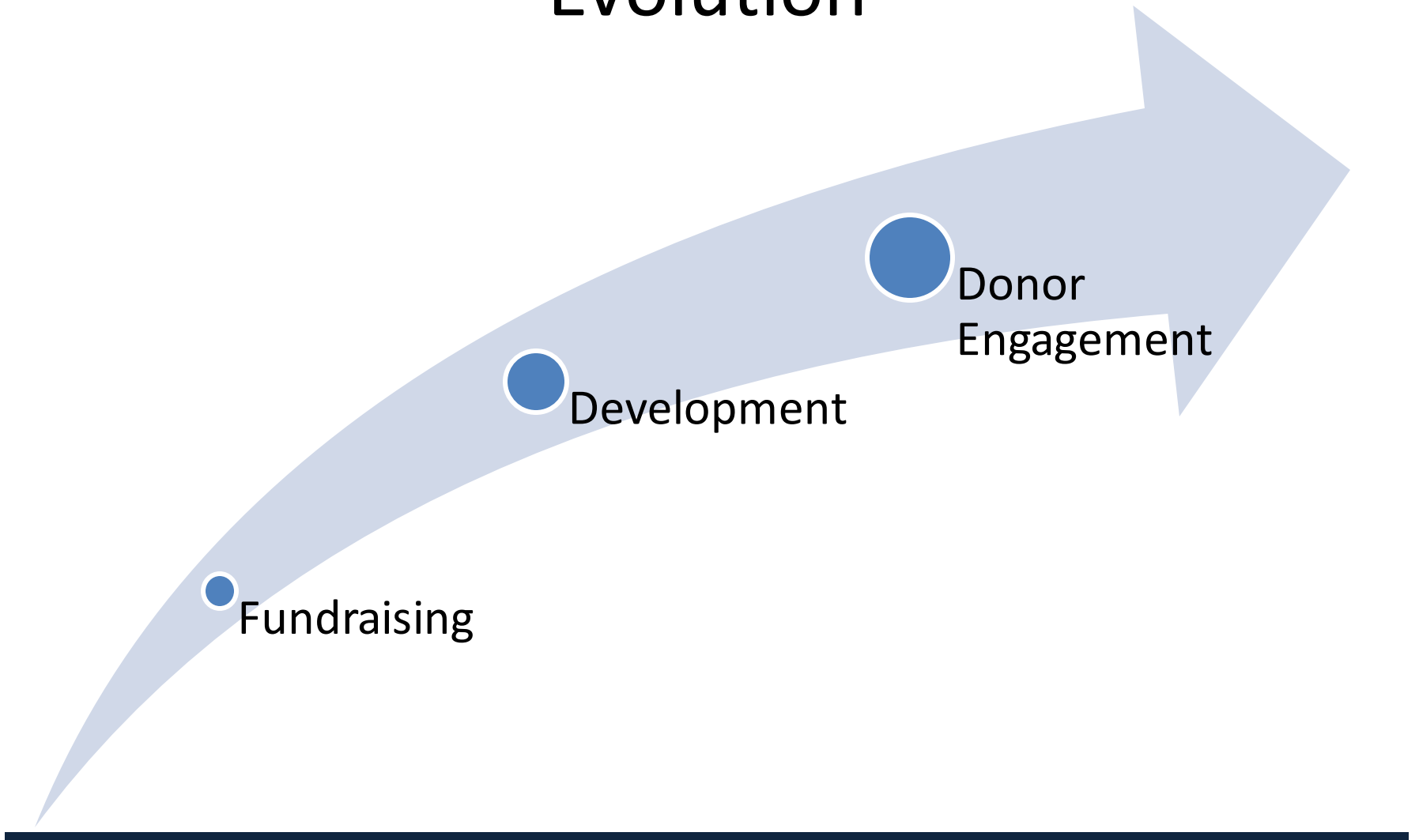
Georgia Gives Day

- Annual statewide giving movement, bringing awareness and funds to Georgia nonprofits on #GivingTuesday
 - 2017: \$4 million donated through GAgives.org
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Objectives

- Engage and empower your board to support your organization in fundraising
 - Identify the roles board members can play in fundraising
 - Understand tools that can support board members in raising funds
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Evolution



Fundraising Pyramid

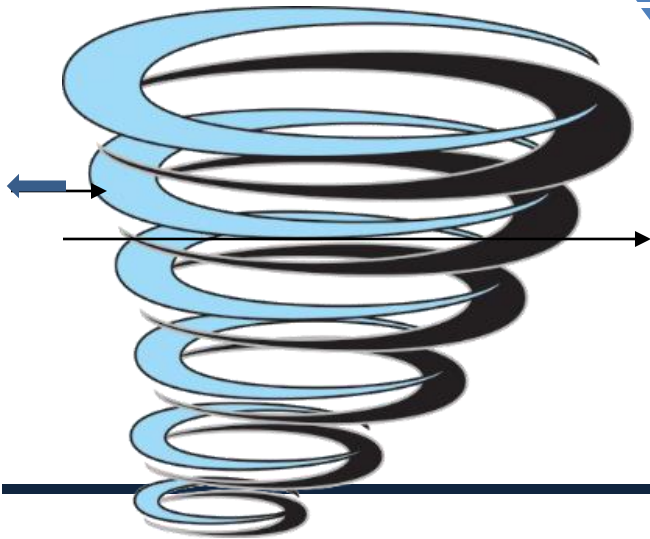
Events- Occasional

Annual donor

Repeat Donor

Major
Donor

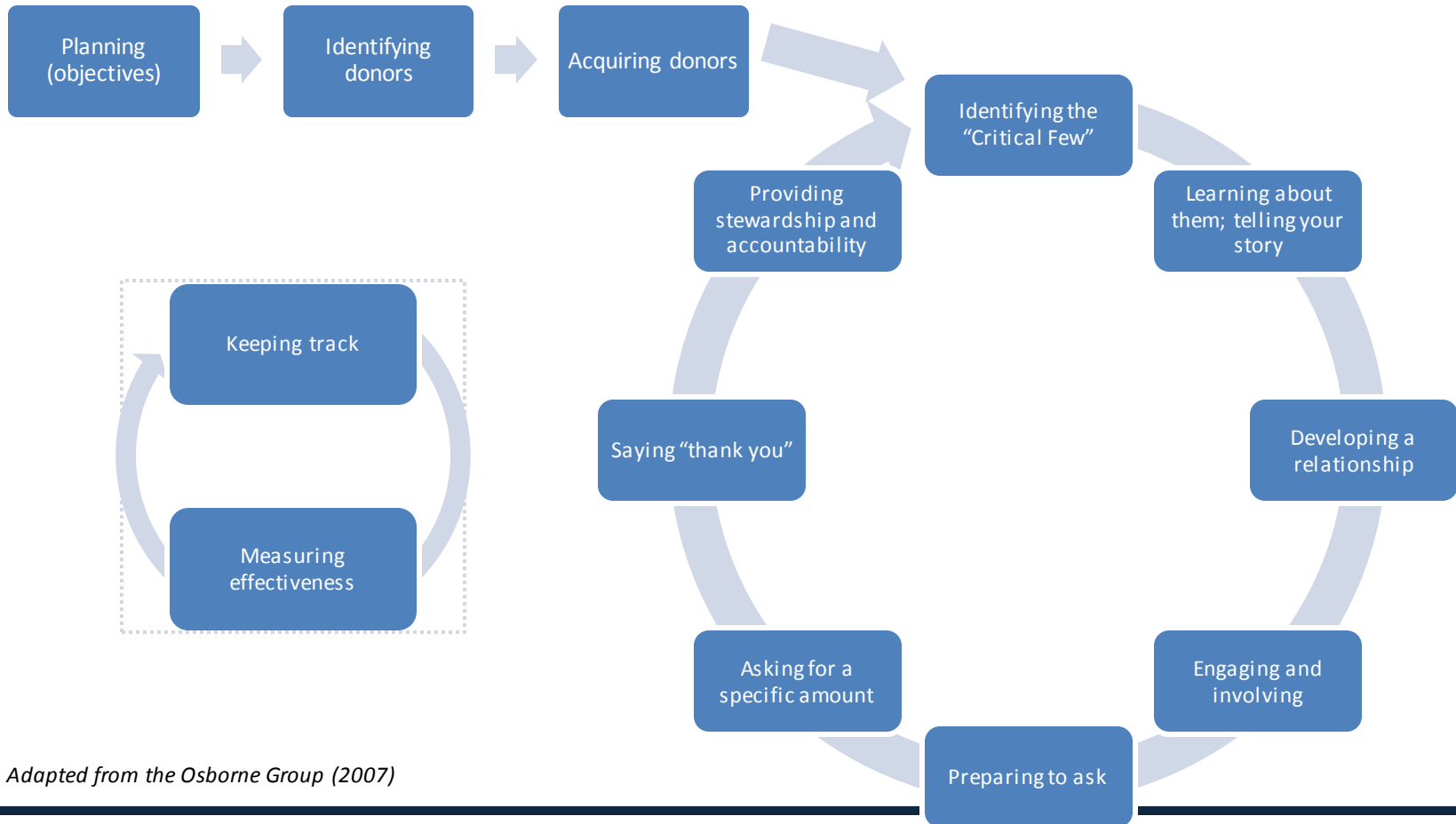
Planned
Giving



Steps to Successful Solicitation

- Identify prospects
 - Share reasons to give
 - Promote organization
 - Involve in organization
 - Ask for donation
 - Recognize gift
 - Steward donors & donations
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Fundraising from Individuals



Adapted from the Osborne Group (2007)

Cultivating Relationships: Individuals

- Personable/personal
 - Existing relationships

 - Passionate? Likeminded?
 - Other giving?
 - Motivations?
 - Timing? Long-term?
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Cultivation

- Communication strategy
 - Wealth vs. potential for giving
 - Frequent interactions
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Quickly vs. Correctly

- Time
 - Understanding
 - Dialogue
 - Tailored ask
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Who Is Going to Do What?

Efficient use of resources

- Material
 - Financial
 - Human (board and staff members)
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Board Responsibilities: Governance

- Define goals
- Delegate responsibilities
- Create policies
- Ensure ethics

Board Responsibilities: Fundraising

- Personal financial contribution
 - Prospects
 - Connecting
 - Solicitations
 - Events
 - “Thank you!”
 - Support fundraising strategy
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Board Fundraising

Role A – The Fundraiser

- Fundraising – making the ask in partnership with staff
- Support the Ask – help make the pitch in partnership with staff
- Friend raising – finding new potential donors

Role B – The Connector

- Connectors and Introductions
- Relationship Partners- Stewardship

Role C – The Ambassador

- Ambassadors – represent and spread the word
- Volunteers – come to events and participate

Fundraising Partnership

- Board
 - Partner with Ex and development staff
 - Clear understanding of roles
 - Understand the development plan
 - Manage, evaluate and strategize on the plan
 - Serve on Development Committee

- Realistic Expectations
- Time – longevity
- Raise more money is the THE answer

What You Can Do:

- Make a personal contribution – 100% and Stretch
- Introductions – 2 or 3 annually
- Participate in presentations – go on the easy one first
 - Share why you are here and mission
 - Leave the details to staff
- Partnership with Staff
 - Prospect together
 - Follow the plan
 - Strategize together



Fundraising Committee

- 3-6 volunteer members
 - Board
 - Non-Board
- ED/CEO, Development staff

Chief Executive Responsibilities

- Organization's rep
 - Potential funders
 - Community
- Contact for donors
- Compliance
 - Funding restrictions
 - Regulations

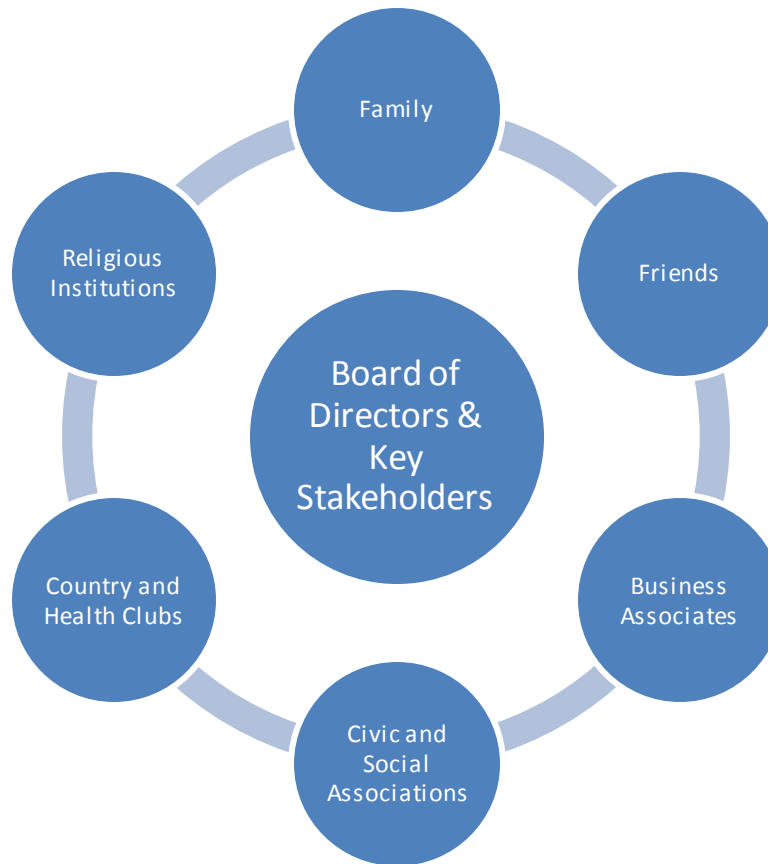
Development Director Responsibilities (if you have one)

- Support of strategy development
- **Execution**
 - Donor relationships
 - Cultivation
 - Maintenance
 - Recognition
 - Promotional materials

Other Staff Responsibilities

- Administrative/office
- Program

Using Relationships



Customize, Personalize & PLAN

The 5 Rs

The Right person asking the Right person at
the Right time for the Right amount for the
Right project.

Cultivation

- What is the best follow-up with the prospect and by whom?
 - Should the spouse, family member or significant other be asked to join future meetings?
 - What is the best/preferred method for sharing updates and org info?
 - How can the next visit become more meaningful?
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Cultivation

- Do the interactions keep the prospect's attention?
 - Are the leadership team and board deployed in meaningful ways?
 - What more could the organization do for or with the prospect?
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The ASK



- How To ASK!

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**

The ASK

- Simplify the Message
- Use Powerful Stories
- Say Dollar Amount
- Create Engagement Tool
 - Example -The DECK

The Ask

- Practice
- Set A Goal
- Take Board Leadership
- Make 2 Presentations Per Month

The Close

- Listen
 - Ask them Questions
 - Let Them Ask Questions
 - Respond to What you Hear not what you want to hear
- Engage
- Use Dollar Amount
- Take a NO – Expect It
- Follow-up



Why Do Individuals Give?

- Emotional or personal connection
 - To cause
 - To organization/person
- Connection to movement
- Impact of programs
- Ease of donating

Positive Side of Objections

Show interest

Better than questions

Consistent, predictable (5–7)

"If that were never solved, would that keep you from making a gift?"

Fundraising Psychology

- “The Joneses”
 - Halo effect
 - Progress to goal
 - Pictures
 - Stats → story
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Value-Based Fundraising

- Humanism
 - Distinction
 - Localism
 - Bonding
 - Progressivism
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Cultivation/Communication Methods

- Face-to-face
 - Newsletters
 - Appeal letters
 - Special events
 - Surveys
 - Crowdfunding
 - Contests
 - Mail
 - Email
 - Social media (videos)
 - Annual reports
 - Events
 - Calls
 - "Thank you!"
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Making the Ask

1. Opening
 2. Questioning
 3. Listening
 4. Presenting
 5. Overcoming Objections
 6. Asking for the Gift
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Recognizing/Thanking Your Donors

- Anonymous
 - Logo
 - Letter/email (tax ID, amount)
 - Personal lunches, meetings
 - Reports
 - Press releases
 - Verbal announcements at special events
 - Social media
 - Hands-on activities
 - Invite to spend time/interact with program recipients
 - Naming opportunities
 - Website
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Stewardship

Delivering on the promise

- Use of donation
- Documenting and managing funds
- Acknowledging donations
- Recognizing donors
- Demonstrating impact

Stewardship Plan (example)

Donor Level	“Thank You” Letter / Tax Receipt	Handwritten Note by ED/CEO	Phone Call by Board Member	Follow-up: 6–8 Months
\$100 or less	Within 1 week	n/a	n/a	n/a
\$101–\$500	Within 1 week	Within 2 weeks	Within 2 weeks	Letter or email
\$501–\$1,999	Within 1 week	Within 1 week	Within 1 week	Letter with handwritten note
\$2,000 or more	Within 1 week	Within 1 week	Within 2 days	In person

Questions?



Georgia Center
for Nonprofits

Elizabeth Runkle, MBA

erunkle@gcn.org

678-916-3079
