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Inclusion Activity

- State your name
- Organization
- Role
- What keeps you committed to the field of child abuse prevention?



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Session Goals

- Strategies to create a philanthropic culture
- Essential policies and the board's role in supporting fund development and a philanthropic culture
- The role of special events in a nonprofit organization
- Donor acquisition, retention, and upgrading

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Traffic Light



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What Does A Board Do?

- Define the organization's mission and for providing overall leadership and strategic direction to the organization
- **Set policy and ensure that the organization has adequate resources to carry out its mission**

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Assigned Duties: 10 Basic Responsibilities

1. Determine organization's mission & purpose
2. Select the chief executive
3. Provide proper financial oversight
4. **Ensure adequate resources**
5. Ensure legal & ethical integrity, maintain accountability



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Individual Board Member Responsibilities



8. Make a financial contribution at least once a year
9. Identify and help solicit new donors
10. Suggest possible new board members

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"Never think you need to apologize for asking someone to give to a worthy objective, any more than as though you were giving him an opportunity to participate in high-grade investment. The duty of giving is as much his as the duty of asking yours. Whether or not he should give to that particular enterprise, and if so, how much, it is for him alone to decide."

— John D. Rockefeller

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Defining Terms

- Philanthropy
- Fundraising

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Definitions . . .

phi-lan-thro-py
 fa 'lanTHrapê/
noun
the desire to promote the welfare of others, expressed especially by the generous donation of money to good causes.
 Synonyms: benevolence, generosity, humanitarianism, public-spiritedness, altruism, social conscience, charity, charitableness, brotherly love, magnanimity, munificence, liberality, largesse, openhandedness, bountifulness, beneficence, unselfishness, humanity, kindness, kindheartedness, compassion; *historical*almsgiving, "a family noted for its philanthropy"

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Definitions . . .

fund-raising
noun
 fund-rai-sing | \ 'fænd-,rā-zīŋ \
 variants: *or fundraising*
Definition of Fund-Raising
 : the organized activity of raising funds (as for an institution or political cause) —often used before another noun a *fund-raising drive/campaign fundraising events*
First Known Use of Fund-Raising
 1869, in the meaning defined

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What's the Difference?

- Donation
- Sponsorship

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Definitions . . .

A **donation** is an altruistic gift, either with a general charitable purpose or for the support of a particular project.

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Definitions . . .

Sponsorship means supporting events, activities, persons or organizations financially or through the provision of products or services and getting something in return (advertising...goodwill for your product)

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Key Development Principles

1. People give to people
2. It's not about money; it's about need
3. Open hearts and minds, then make an ask
4. Development professionals are skilled active listeners
5. Don't ask people to give, *inspire* them to give
6. Thank your donors properly and *often*

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Board vs. Staff Roles: What is a Good Balance?



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Primary Roles of Board

- The governing body together has three main foci:
 - Direction – The board guards the mission of the organization and, through guidelines, steers it in the right direction.
 - Oversight – The board monitors the activities, the health, and the ethical behavior in the organization.
 - Resources – The board ensures that the organization is well-equipped to fulfill its mission – adequate finances, capable staff, and esteemed reputation.

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Before You Involve Board Members...

- Do you have a Development Plan?
 - How much do you need to raise annually?
 - Do you know your program budgets/monetary needs?
 - What is your CTRD per initiative? Include “soft” costs
 - Direct mail
 - Events
 - One-on-one asks

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Why Is This Important?

- Get ahead of the curve
 - Difficult to ask what you want when you don't know what you need...
- Avoid burnout
 - "I bought and sold raffle tickets, attended 3 events and (in extreme cases) made brownies."

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Effective and Rewarding Participation

- Know your needs
 - Create a menu of board participation options
- Relay expectations during board recruitment
 - Help create and perpetuate a culture of philanthropy...

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Board Member Responsibilities

- Be Ambassador
- Make a personal gift
- Add prospective donors
 - Create opportunities
- Participate in an ask(s)
- Thank donors

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Practical Application

- Review the Fundraising Policies Checklist Handout
- Answer the questions
- Place a (*) star next to things that you are doing well
- Place a (?) question mark next to things that you need to improve

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Consider This:

SOURCE	AMOUNT	Variation from previous year	% of total
Individuals	\$286 Billion	+5.2%	70%
Foundations	\$67 Billion	+6.0%	16%
Estates	\$36 Billion	+2.3%	9%
Corporate	\$21 Billion	+8.0%	5%
TOTAL	\$410B	5.2%	100%

Source: Giving USA 2018 report (data is 2017)

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Special Events

- What's the purpose? (Acquisition/Prospecting? Retention/Feel good? Upgrade/Thank You/Vision? – Can you do it all in one event?)
- What are you netting and why does it matter?
- What's your strategy for turning a special event attendee into a donor?

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Using Special Events as a Tool in the Philanthropic Process

- Do homework ahead of time (attendee giving history, alert/assign board members and let them know why they are spending time with this person)
- Greeting at moment of arrival
- Sign in (name, address, phone number, email, who invited them)
- Brief mix and mingle
- Thank you for support
- Program (history, mission, overview, numbers)
- Emotional Hook
- Thank you again and wrap up

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Follow Up

- Most important step
- Follow up never ends
- Attendees: Phone call, letter, VISIT – ask for feedback
- Customize plan for each
- Couldn't attend: Phone call seeking visit

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Retention *and* Upgrading Require a Relationship

- A gift is a step in a relationship – not a one-off business transaction
- Takes time – sustaining the relationship will produce levels of support and advocacy that are worth it
- Donors are not ATM's

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A photograph of Tom Cruise from the movie 'Mission: Impossible - Ghost Protocol' talking on a mobile phone. A speech bubble next to him says "SHOW ME THE MONEY!".

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Plant the Seeds...

"More grows in the garden than the Gardner knows he/she has planted."

- Spanish Proverb

A photograph of a well-maintained garden with a variety of colorful flowers, including purple, yellow, and pink blooms, and green foliage.

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Keys to Retention and Upgrading

- Thank donors well
- Speak their language and listen actively
- 8 touches/year
- Feed your soul and share your stories
- Include **simple** bequest language early and often
- Build a culture of philanthropy throughout your organization

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So...What Can/should I do?

- Review Fundraising Board Member Responsibilities
- Place (*) next to what you currently do
- Place (**) next to what you can add

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Be the Gardner...




- Lead by example
- If you don't ask you won't get
- Make it personal and meaningful

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STRENGTHENING NONPROFIT
GOVERNANCE AND MANAGEMENT

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