Engaging Board Members in Fundraising

Minnesota SSO Conference
February 2020
Today’s Learning Objectives

By the end of today’s session, you will be able to…

• Define board member’s role in fundraising
• Prepare board members for fundraising success
• Identify strategies to improve board engagement throughout the fundraising cycle
What do you wish your board members did to support fundraising?
Board members role in fundraising
The roles of the board

1. Establish **mission and direction**

2. Ensure the organization has the **necessary resources of funds and leadership** to implement the mission

3. Provide **legal and fiduciary oversight** on behalf of the people served, the organization’s members and supporters, and the public
Setting Expectations: Recruitment

- Choose your nominating committee wisely
- Understand the fundraising strategy and what is needed to accomplish
- Letter of commitment that outlines expectations
- Don’t be afraid to cold call a community leader
- Have an ongoing list of potential board members
- Recruit a diverse board
- Do not make deals
- Promise and deliver on fundraising training
- Clearly define fundraising to potential (and current) board members

Weisman, Carol, 9 Tips for Recruiting a Fundraising Board
Setting Expectations: Orientation

Sample Orientation for Board Members

- Introductions and Networking
- Overview of the mission, vision and strategic goals
- Responsibilities of board members and committees

- Finances and Fundraising:
  Overall financial situation of the affiliate and fundraising expectations; including board giving policy
- Cultural aspects of the board
- Data collection
What to give board members as part of orientation?

• The Case for Support

• Business Cards

• Profile of members of the Board
Board members and giving
We must remember that board members are volunteers and donors. And we should remember that philanthropy, by definition, is voluntary. When we attempt to force people to give, we risk taking the joy out of it.
Talking with the Board about giving

• Meet individually with each member
• Provide updates on the topics of greatest interest to them
• Inquire how they’re feeling about their partnership with the organization
• We’d listen to what they had to say
• Ask them for a gift that would help meet both the organization’s needs and the donors’ charitable goals
The Fundraising Cycle and Board Engagement
The Fundraising Cycle

1. Case for support
2. Prospect research and identification
3. Raise awareness
4. Cultivate and consult
5. Solicit (the “ask”)
6. Stewardship

In Action
Case for Support

• Driven by mission & strategic plan
• Describes goals & objectives and financial support opportunities
• Clearly articulates programs and services
• Answers “Why us, Why Now and Why You”

Board Involvement:
• Ensure board members know and understand strategic vision and goals
• Mission Moment: listen to staff or other board members share why they are passionate about the mission
• Encourage board members to tell the Habitat story
Habitat Lakeside's 2019-2023 Strategic Vision:
A world where everyone has a decent place to live.

**OUR GOALS**
- Over the next five years, Habitat Lakeside will:
  - Serve over 600 people through our housing solutions
  - Engage over 10,000 people through volunteer & financial support
  - Target (but not limit) our efforts in the federal government's designated Opportunity Zones within Sheboygan County in an effort to increase property values and the homeownership rate

**OUR DIRECTION**
- Expand Housing Solutions and Transform Neighborhoods
  - Provide housing solutions to improve neighborhoods
  - Expand services offered in the neighborhoods where we build
  - Actively support the global need for affordable housing
- Develop Value in Our People, Assets, Relationships and Interactions
  - Grow the number of volunteers involved in our mission and develop strategies to maintain a high level of volunteer satisfaction
  - Provide a culture which encourages professional development
  - Demonstrate compassion and understanding for the different populations we serve
- Raise Awareness for Our Brand and Tell Our Story
  - Educate Sheboygan County about Habitat for Humanity Lakeside
  - Educate about the need for and impact of affordable housing
- Strengthen Existing Partnerships and Develop New Partnerships
  - Strengthen or grow relationships with municipalities, churches, schools, trade unions, building professionals, neighborhood associations, Veteran organizations and other housing providers

1. Case for support

2. Prospect research and identification

3. Cultivate and consult

4. Solicit (the "ask")

5. Solicit (the "ask")

6. Stewardship
Prospect Research and Identification

- **Linkage**
  relates to a contact, bridge or access point through a peer to the potential donors

- **Ability**
  relates to the financial ability for the potential partner to give to Habitat

- **Interest**
  relates to the potential donor’s interest in Habitat for Humanity and our mission

**Board Involvement:**
- Keep an eye out for pockets of community members who could be strong prospective donors
- Participate in prospect exercises
Raise Awareness

- Elevator speech
- Media relations, Press releases
- Community events, Networking events
- Affiliate communications:
  - Social Media
  - Newsletters

Board Involvement:
- Serve on affiliate speaker’s bureau
- Share affiliate posts on social media
- Wear your Habitat polo or nametag
- Invite someone to an upcoming event
Cultivate and Consult

- Building relationships with prospects
- Generating interest in the organization
- Showing prospects what the organization is all about – history, programs, etc.

Board Involvement:
- Volunteer and bring along a prospective donor
- Make personal contacts with prospects and introduce them to Habitat
- Host a tour to show prospects the facilities, houses or neighborhood
What are some ways in which your affiliate engages board members in cultivation activities?
Solicitation

1. Presenting Habitat’s case statement
2. Participating in a one-on-one solicitation
3. Sending direct mail
4. Making telephone solicitations
5. Asking for corporate sponsorships
6. Writing grants

Board Involvement:
1. Make the Ask: Businesses & Individuals
2. Submit names for direct mail
3. Sign and add personalized notes for direct mail
Preparing Board Members to Make the Ask

- Make your own gift first
- Build rapport
- State the Case for Support
- Encourage Involvement
- Summarize Benefits & Close
- Be Quiet
- Respond Appropriately

Excerpted from The Complete Guide to Fundraising Management, 2nd edition, Weinstein. pg. 139-147
Photo Credit: istock.com
Preparing Board Members for the response

1. YES.
   (Roughly 10% say "YES" outright.)

2. NO.
   (Less than 5% say "NO"—the most unlikely response.)

3. I NEED SOME TIME TO CONSIDER THIS.
   (More than 70% respond this way—the most likely response.)

4. I DO NOT KNOW IF I CAN GIVE $25,000, BUT I CAN GIVE $10,000.
   (Some 15% respond in this way. Must be handled tactfully!)
What are some ways in which your affiliate engages board members in solicitation activities?
Stewardship

- Thank donors and let them know their gift made a difference
- Maintain donor relationships
  - Thank you letters
  - Donor recognition opportunities
  - Reports on the impact of their gift
  - Updates from the organization

What you can do:
- Send letters of appreciation and personal notes
- Send invitations to special events and program events
- Thank you telephone calls
The power of a board member

thank you
Hello. I’m Kristen, a volunteer with the Board of Habitat for Humanity of Douglas County. I’ve just been informed that you have made a first gift to our organization and I wanted to call you myself just to say how very much we appreciate your support.

Most calls were 45 seconds in length and many left on voicemails – they were very effective:

• To retain donors longer
• Increase value of subsequent gifts
What are some ways in which your affiliate engages board members in stewardship activities?
Engaging Your Board
Questions?
This presentation has been made available to affiliates through Habitat’s Resource Development Expertise Hub.

Find more resources at MyHabitat
Contact the Resource Development Expertise Hub team at rdexpertisehub@habitat.org