

Board Engagement with Fundraising

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Indiana University



Notes:

Fundraising

“The gentle art of teaching the joy of giving!”



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Notes:

<u>Scope</u>	<u>Board Responsibilities</u>
Internal	Determine mission and purpose
	Strategic planning
	Evaluate the CEO
	Oversee programs and services
	Fiscal control
External	Reduce risk
	Rolodex / Contact list
	Donate and fundraise
Legal	Ensure legal compliance



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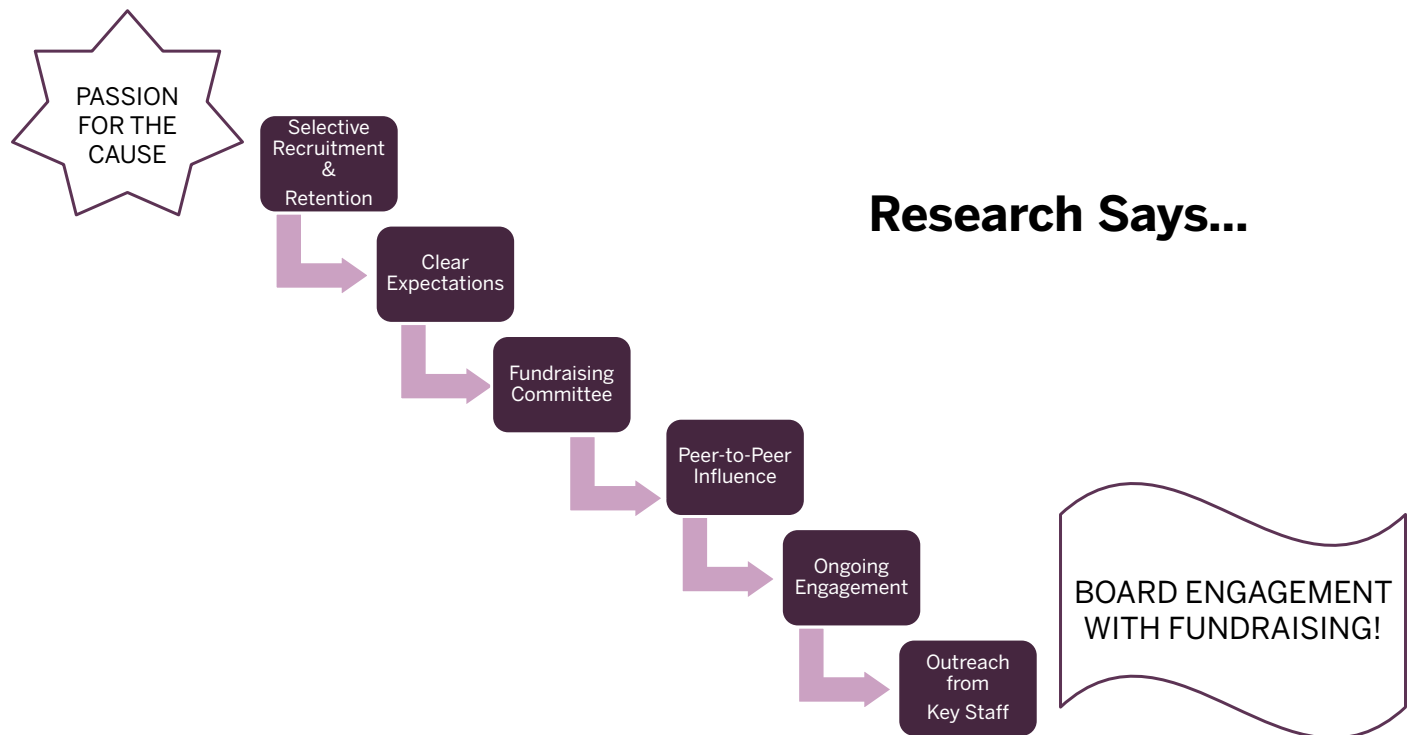
(Miller-Millesen, 2003)

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Notes:

1. Selective Recruitment & Retention: Passion for the Cause

Questions to Ask

- 1) What evidence do we have that this prospective board candidate is passionate about our nonprofit's cause, mission, programs, and impact?
- 2) How does the prospective board candidate explain how our nonprofit's cause matters to them personally?
- 3) Does the prospective board member have stories to tell of life-change or community improvement associated with our nonprofit's cause?
- 4) Has the prospective board member volunteered with our nonprofit or a similar nonprofit elsewhere?
- 5) What are we observing and learning as the prospective board candidate meets with board leadership and the CEO?
- 6) What are we observing and learning as the prospective board candidate visits or otherwise learns about our programs and services?
- 7) Is there anyone else we know who can provide additional information about the prospective board member?



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(Balduck et al., 2010; Hoyer, 2007; Kugel & Mercado, 2024;
Preston & Brown, 2004; Rentschler et al., 2023)

Notes:

1. Selective Recruitment & Retention

- ☐ Identify open board seats;
- ☐ Determine board needs (demographics, skills, other personal attributes);
- ☐ Maintain an active list of potential board members;
- ☐ Patiently vet prospective new board members, starting with passion for the cause;
- ☐ Meet with the prospective board candidate to learn more about their potential strengths associated with serving on the board;
- ☐ Assess other intangibles associated with team chemistry;
- ☐ Consider inviting the prospective board candidate to first serve on a board committee;
- ☐ The board's governance committee then assesses the gathered information and decides whether or not to recommend the candidate to the full board;
- ☐ If the board approves: Invite, Welcome, Orient, Celebrate!



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Notes:

1. Selective Recruitment & Retention: Removing Unengaged Board Members

“If you’re unwilling, then I need to know that. I don’t want to waste your time. We’ll move on to somebody else. Don’t become involved.”

“If you feel strongly about not (making a charitable donation), then don’t take a (board) seat from someone who could. Resources are limited, (but) people are plentiful.”



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(Stanczykiewicz, 2020)

Notes:

2. Communicate Expectations

Communication	Result
Expectations for donating and fundraising during new board member orientation	Active board participation in donating and fundraising is 11 times greater
Fundraising Expectations	94% of nonprofits with full board participation in fund development communicated these expectations
NO Fundraising Expectations	87% of nonprofits without full board participation in fund development did not communicate expectations

“We try to paint the clearest picture possible of what they’re getting themselves into so that there are no surprises. We go through ten different things that we expect from a board member, and one of them is (charitable) giving.”



Notes:

3. Fundraising Committee

Active board participating in donating and fundraising **nearly doubles!**

“The fundraising committee transforms our nonprofit's fundraising to ‘we’ instead of, ‘the staff is here; the staff does all of the fundraising.’”



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(Stanczykiewicz, 2020)

Notes:

4. Peer-to-Peer Influence

“Board members can (encourage fundraising) and say that once, and it’ll resonate. I (the CEO) could say that 10,000 times, and it won’t. There’s a lot of peer-to-peer communication.”



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Notes:

5. Ongoing Engagement

SELF-FOCUSED

- Enhance my self-worth
- To feel important
- Gain recognition in the community
- To experience self-healing
- I eventually want to be hired by this nonprofit
- I am retired, unemployed, or otherwise need something to do
- My employer expects me to serve on the board
- I have friends on the board

OTHERS-FOCUSED

- Out of loyalty to the nonprofit
- Learning more about the cause
- Commitment to the mission
- Sharing their expertise and professional skills
- In ways that are helpful to others
- Especially people served by the nonprofit
- Advancing the nonprofit's success
- While contributing to society



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(Miller-Stevens & Ward, 2019)

Notes:

5. Ongoing Engagement

- Mission Moment
- “Big Rock” at board meetings
- Invites to programs & events
- Quarterly luncheons
- Donor meetings
- Donor stewardship
- Apparel
- Board retreats

“In this last board meeting, after the mission moment, we had one board member say, ‘I change my pledge.’ In the meeting she (increased) her pledge because she realized just how important her investment is.”



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(Stanczykiewicz, 2020)

Notes:

6. Outreach from Key Staff

BOARD-REGARDING BEHAVIORS	IN PRACTICE	RESULT
Show Respect	Attend meetings and events that are important to the board member	Board member knows you see them as a whole person, not as someone obligated to help your nonprofit
Consistent Interactions	Meet with board members in-person between board meetings	Board members stay engaged, and their prospective donor list stays active
Promote Innovation	Provide board members with advanced notice of the “big rock” for the next board meeting	Board members can prepare and then thoughtfully participate in the next board meeting
Celebrate Board Member Accomplishments	Contact board members with their donor provides a gift	No board members ever complained about being thanked or celebrated too often!
Time Information	Communicate with board members based on their preferences	Board members appreciate seamless and accessible info

“That's the first time somebody has said, 'Hey, here's some tickets for you. Why don't you come and join us?' It's nice to be recognized without somebody just always expecting something from you.”

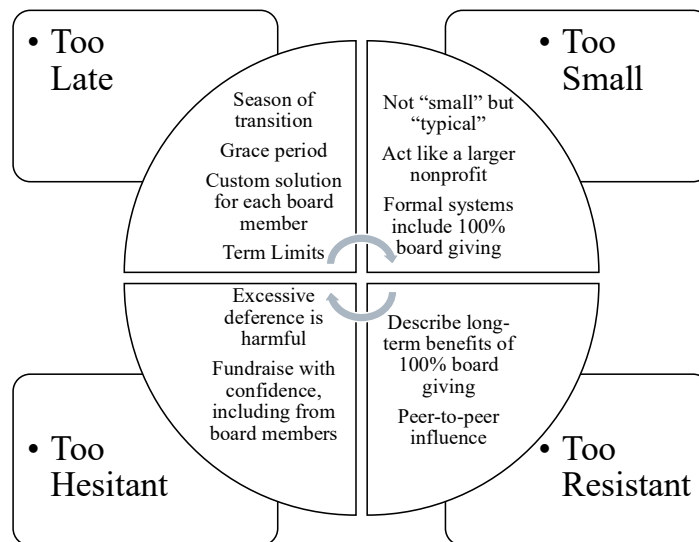


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(Herman & Heimovics, 1990; Stanczykiewicz, 2020)

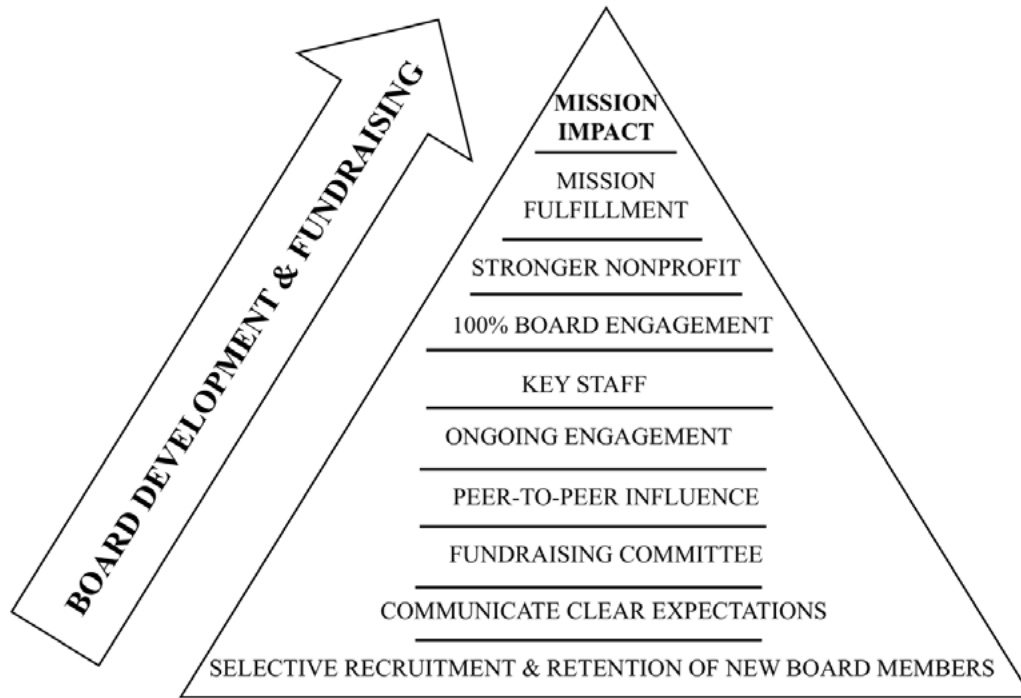
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Board Member Resistance & Possible Solutions



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Board Structure, Composition, & Practices

1. Board size
2. Board composition (Representation)
3. How many board meetings
4. Fundraising training
5. Staff engagement with the board and board committees
6. Board assessment



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Notes:

Board Engagement with Fundraising

FUNDRAISING	BOARD ROLE
Organizational Readiness	Ensure program fidelity to the strategic plan; approve budget & fundraising plan
Annual Fund	Donate; Prospect list; Introductions to prospects
Donor Stewardship	Thank you notes, emails, phone calls; in-person meetings
Major Gifts	Help qualify prospects; attend donor meetings; tell "Miracle Moment" stories
Fundraising Campaigns	Approve campaign plan; campaign donation; attend meetings with lead donors
Planned Giving	Approve additional training as needed; pledge or make a planned gift



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Thank You.



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