

The Board and Development

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Nonprofit Learning Center

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Principles of Board Involvement in Development

Number One

The Board alone is ultimately responsible for attracting funding resources to ensure the financial viability of the organization and its programs

Number Two

Asking for and giving money are natural processes, and need not be viewed as something to be avoided

Number Three

Board members should help in preparing the “case,” which is the rationale for supporting the organization, and be able to explain the case persuasively to prospective donors

Number Four

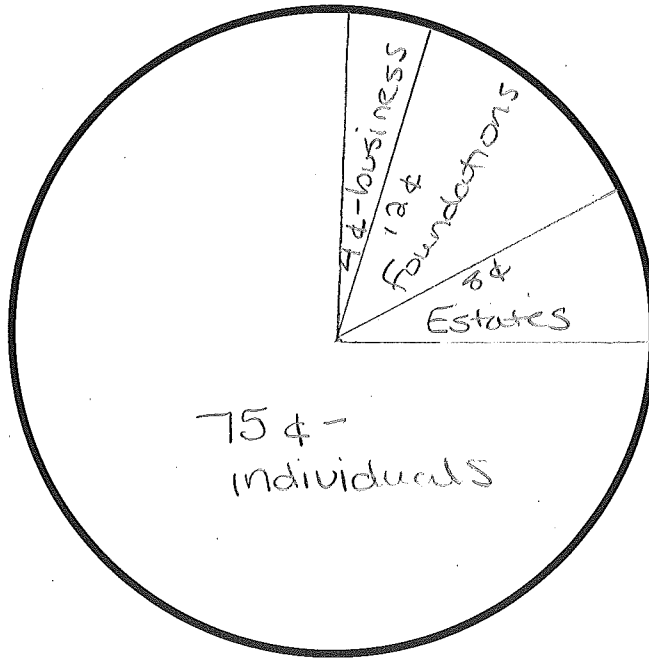
Every Board member can do something useful to support the fund-raising effort, employing his or her own skills and interests

Number Five

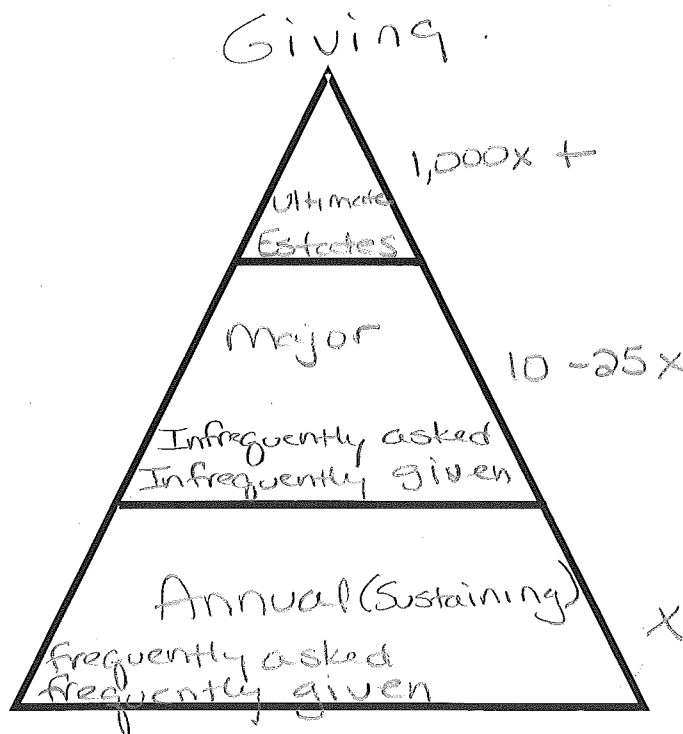
Motivation of Board members is the most critical and the most difficult task of all

About Giving

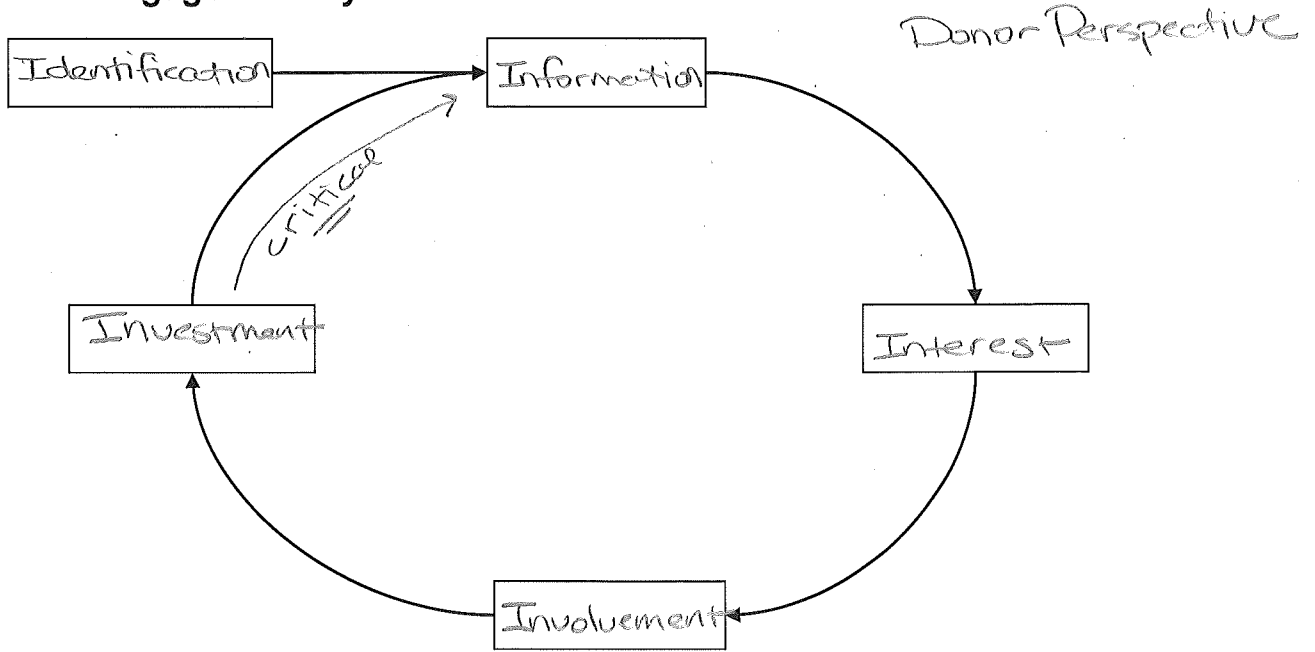
How big is charitable giving in the United States? \$ 300 billion



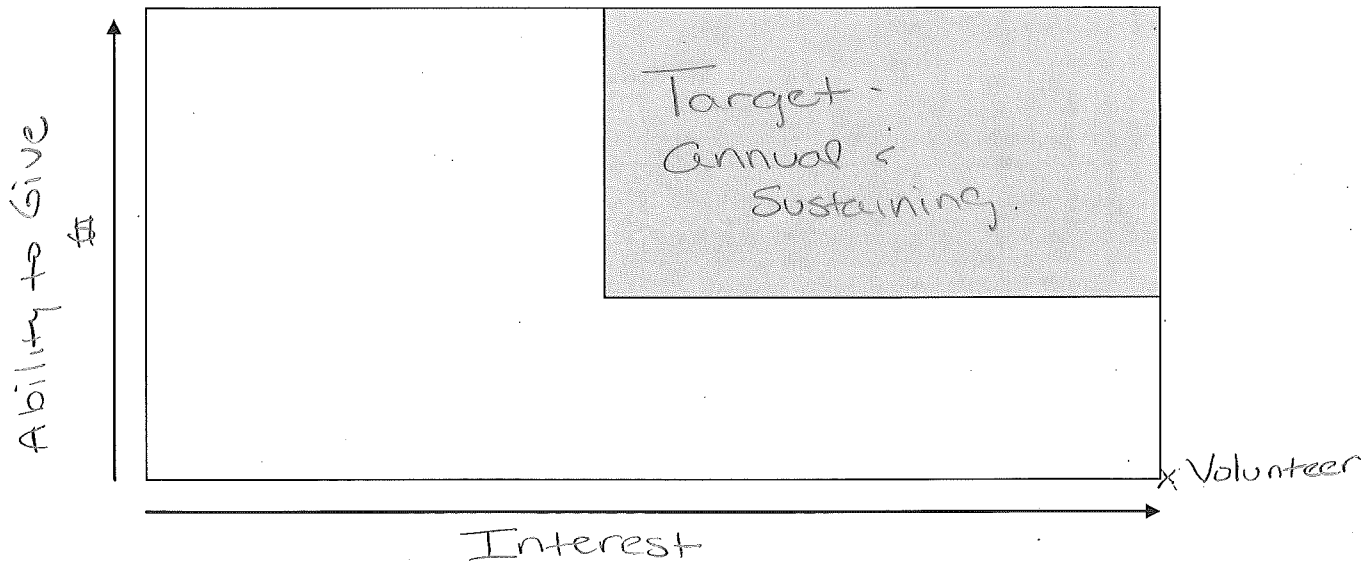
Environment
of
Abundance



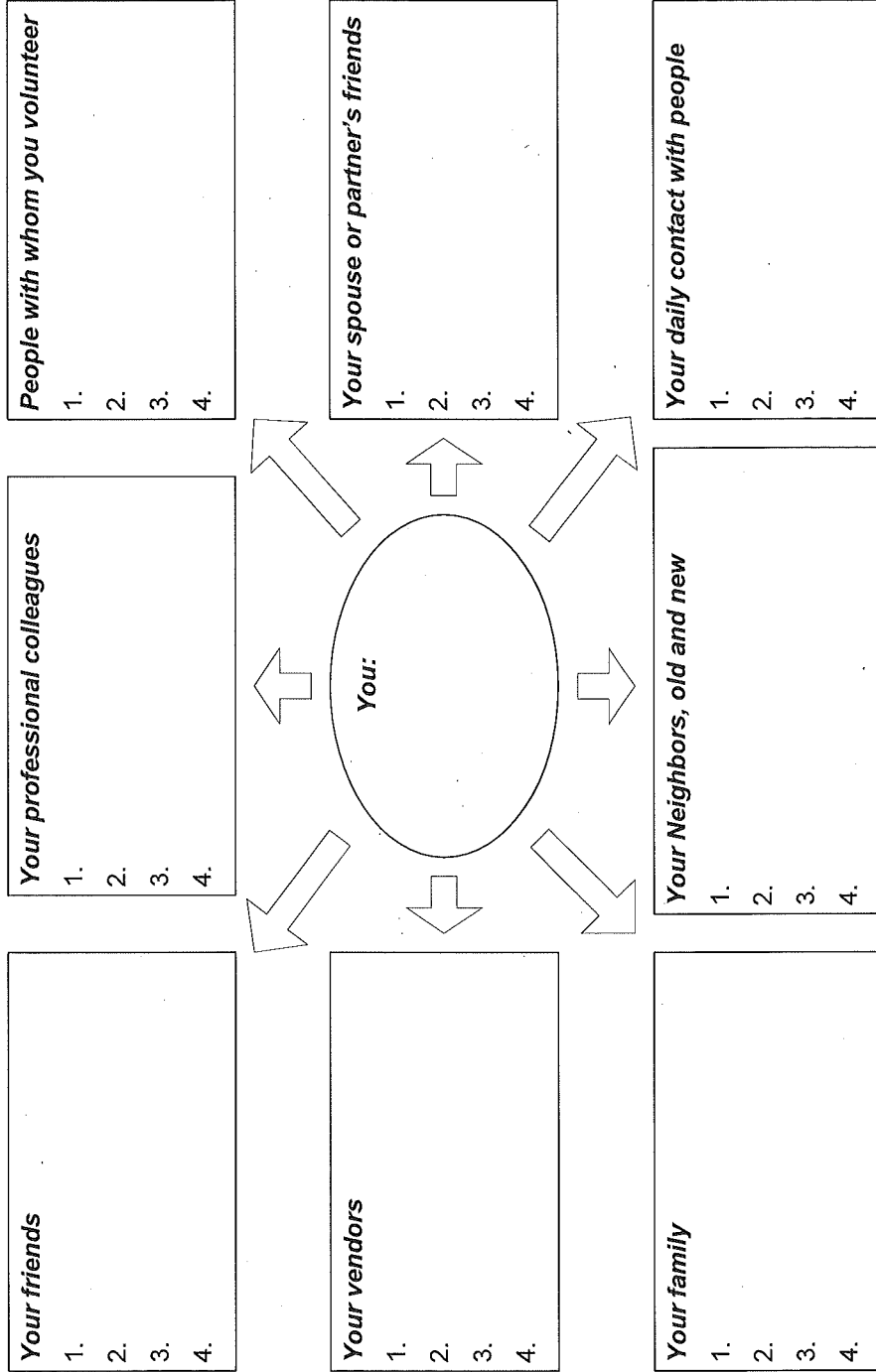
Donor Engagement Cycle



Identification



Connecting to our Community



The Institutional Hug: Simple and authentic ways to inform and involve our supporters:

WTA WA Trails Assoc.	Your Nonprofit
1. Call existing donor to say "Thank you"	1.
2. Call to invite to free lecture (activity) with Board Member	2.
3. E-mail featured article to donors	3.
4. Ask past donor for (non-financial) help ex. contact legislator	4.
5. Invite donor to VIP reception at Trails Festival	5.
6. Invite donor on a hike	6.
7. E-mail from Executive Director about wildflowers currently blooming	7.
8. Invite to assist with service project ex. Trail restoration	8.
9. Ask for \$	9.

Anatomy of a Solicitation

#	Agenda Item	% of Meeting	Minutes	Notes
1.	Preliminaries		2	Establish relationship/ Common ground 2-people - board member, ED, volunteer
2.	Opening/ Intro	10%	2	Common ground/ Institutional relationship Gain attention - here to ask for \$
3.	Presentation	40%	4-5	Setting/building the case for support
4.	Negotiation	40%	4-5	Reviewing a proposed project Describe benefits & outcomes - not features * State the expected commitment
5.	Closing	10%	1-2	Creative redundancies agreed upon next step. handle objections

Thirteen hideous reasons you didn't get the gift by Debra Ashton

1. Cultivating too long
2. You've become the prospect's friend
3. You talk too much.
4. Didn't have a strategy.
5. You didn't bring a proposal on the visit.
6. No defined institutional goals.
7. You're the wrong person to ask for the gift.
8. Didn't give the donor a date to respond.
9. You solicited the wrong person.
10. Talked about what you need (instead of what the donor needs).
11. You're afraid of rejection.
12. Never called for the appointment.
13. Didn't ask for the gift.

<http://www.socialvelocity.net/2012/01/9-ways>

But, I still don't want to raise money! What else? . .

1. Help create or evaluate a business plan for an earned income venture
2. Advocate for government money
3. Provide intelligence on prospects
4. Set up a meeting with a prospective customer
5. Email, call or visit a donor just to say thanks.
6. Explain to prospect why you serve
7. Host a small gathering at your home
8. Recruit in-kind service
9. Negotiate a lower price from a vendor.

Now What?

Get on Direct Mail

- Assign prospective donors from “Connecting to our Community” exercise to letter campaign
- Make Merge File
- Merge and Print Letters
- Sign by Board Members
- Stuff and Mail
- Process Gift promptly
- What about E-mail?
 - Direct mail guru, Penelope Burke, says that her best advice is: Every time you want to send an e-mail to your donors, ask yourself these three questions— Is it short? Is it exciting? Is it essential my donors know this? If it isn’t, don’t send it.

Make the Calls

- Do telephone solicitation of the base of the pyramid
- Make it easier: Do it together

Do the visits

- Identify top-20
- Set gift targets
- Determine call team (two people)
- Get appointment
- Have Meeting
- Celebrate effort
- Do Face-to-Face Solicitations

Crafting a great Donor Letter:

The Outline

1. *Gain Common Ground (I know you!)*
2. *Make the Case (Tell a great story)*
3. *Ask (Keep it Clear)*
4. *Complimentary Close*

Tips:

- *Lots of white space*
- *Keep to one page*
- *Personalize*
- *Use the PostScript*
- *Include a reply envelope*
- *Consider springing for reply postage*

Getting gifts by phone:

- *Commit to a time*
- *Make a list*
 - *Past donors*
 - *Judge not for personal solicitation*
- *Write a script*
- *Bring cell phones*
- *Call together*
- *Work in small blocks of time*
 - *Perhaps three, 20 minute blocks with an introduction, five minute breaks and wrapup) . . . 90 minutes total*
- *Celebrate Success*

NOTES: